



The **Universal Truth** is that every owner will exit their business...

The **Question** is on whose terms: Circumstance, Others,... or **Yours?**



Our Axiom: Stay in Control, Maximize Value, Reduce Risk

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## Executive Assessment Transition Plan

Transition planning is working together to plan for the transitions through the remaining productive phases of your professional life. To set the stage for your "retirement" and your inheritance plan as well.

### A SUCCESSFUL "EXIT" DEFINED

Stay in control until you receive the most money possible, net, after taxes/costs, at the most favorable terms for you.

### CREATE LIQUIDITY... CREATE CERTAINTY

There are actually a number of financial tools available to the typical, successful private business to assist in the your financial objectives of creating liquidity, diversifying wealth, reducing risk and enhancing returns.

### KEEP KEY EMPLOYEES AND CUSTOMERS

Change creates anxiety and uncertainty. Employees focus on their families. Why will they stay? Is it risky for them to stay? What happens to your transition plan and company value if they leave?

### OUR ASSESSMENT PROVIDES YOU DIRECTION

Survey session with Senior Adviser, analysis by our team and soft, review of visual graphs and most important factors for you to consider.

**Action Step:** Complete our 'Transition Plan Essentials' session and get direction—clarity.

**Comprehensive, Fast... Gain Confidence.**

Prepare business owner, from a position of control, for the single, most important financial event of their lives – the transition out of their businesses, on their terms – converting an illiquid asset into liquid, retirement assets and cash for themselves, their families, and future generations.