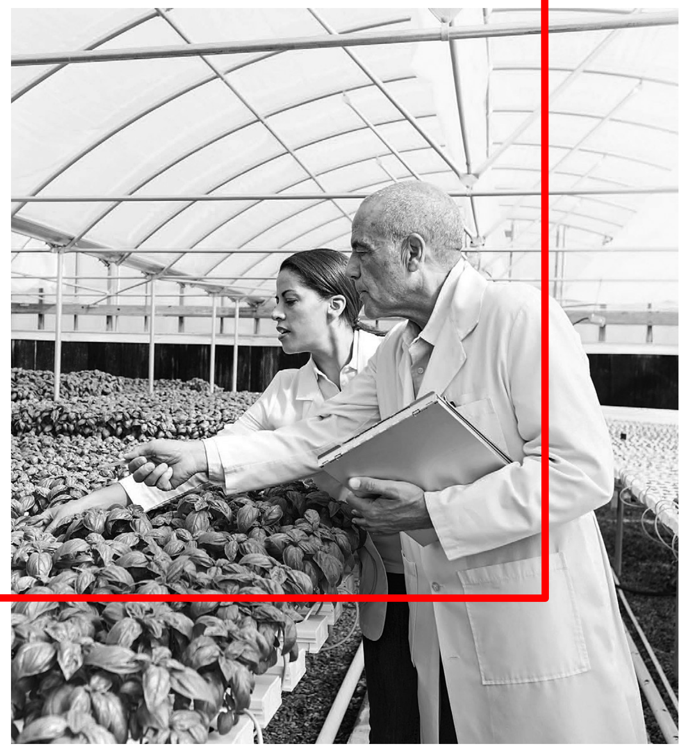
Monetizing your life's work

Selling your business requires an experienced advisor



Involving a financial advisor in the exit planning process is a critical component to ensuring a successful transition of your business.
A financial advisor can help you feel confident that the post-sale proceeds will be sufficient to create a sustainable cash flow for life.
A financial advisor will also help you understand the personal financial implications of all your exit options and the associated trade-offs for each. A financial advisor will also help you plan for life after exit as a means to ensure a successful transition for you and your family.

The role of a financial advisor in exit planning

- Assesses how financially dependent you are on your business proceeds.
- Prepares you personally for the transition.
- Helps you understand how income and retirement planning is critical to your success.
- Educates you on how to bridge the wealth gap if your business is not worth enough to exit right now.
- Shows you how planning in advance could minimize taxes.
- Guides you in planning for life after exit that considers both active and passive use of your time and capital.

What are the exit planning deliverables that you should expect from your financial advisor?

- Wealth gap analysis. Quantifies the difference between what the business owner needs to get from the sale of the business and how much the business is currently worth.
- Personal cash flow plan. Five-year plan based on a post-sale budget and longer term wish list.
- Long-term financial plan. Goals-based plan that considers liquidity, longevity and legacy objectives but also incorporates multiple stress tests for a range of after-tax proceeds, deal terms and long-term goals of the business owner and his or her family.

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Our team brings over 25 years of experience in both the for-profit and nonprofit worlds. We help serial entrepreneurs, business owners and their families make informed decisions so they can leverage the value of their largest and most important asset—their business—to create a legacy for the people and causes they care most about. We focus on combining business transition advice with impactful personal planning conversations to help our clients navigate business, financial and personal issues during important transition points in their lives.