

Resources to Help Grow, Support and Sell Your Business

Solutions That Can Provide Businessowners with Confidence at Every Stage

■ by Matt Hansen, CFP®, CEPA®

Senior Vice President-Wealth Management, UBS Financial Services, Inc.

How are you approaching your business challenges? Your passion has turned into a successful business. But you may still have questions that could impact the growth and value of your company: What if I want to expand? Am I making the right investment choices for my business? When is the right time to start planning to exit my business? What resources are available to help me reach my objectives?

You may need capital resources to help your business grow. You may need investment banking resources if you're considering selling your company. And you may need comprehensive planning that integrates all aspects of your business operations and personal finances. You need strategic planning at every stage of your business.

You may be able to take advantage of tailored solutions and financial and investment strategies that can work toward your ongoing goals, such as:

A Cash-flow analysis. A well-designed strategic asset allocation can help you bridge any possible short-term liquidity needs that may arise.

Asset allocation advisory to establish and create an appropriate balance to your investment portfolio that aligns with your long-term goals and objectives.

A Net worth analysis to help you calculate a more accurate

valuation of your business for planning purposes.

Convenient access to cash, credit and lending is key to meeting your shifting needs. Liquidity and financing solutions can help you grow and meet your objectives with confidence.

As a businessowner, you may have a broad range of options for business loans. A full suite of cash management capabilities can help you manage your long-term investments and your short-term cash in one place so you can optimize your wealth management strategy. Have you explored all your options?

In addition to options for business lending, an experienced financial advisor can offer guidance on how to integrate strategies such as wealth planning, investment banking, portfolio advisory services, complex insurance solutions and retirement planning services.

It's never too early to start planning your exit strategy. The sale of your business may be some time down the road, but the steps you take now can have a big impact when the time comes. Choose an advisor that can collaborate with a team of professionals to help you with the complexities for your business and personal financial planning – before, during and after the sale.

Transitions are complex decisions based on a variety of personal, business and market-related factors. Should you choose to pursue a sale, you may need help to prepare your business for the transaction and identify an investment bank that is right for you.

What are your options for transition and succession planning? Even if those considerations are further down your time horizon, you can get help now to understand your potential options including an outright sale, recapitalization, transition to management or the next generation, a leveraged buyout or a transition of ownership.

If you plan to keep your business within the family after you sell, there are valuable resources available to businessowners who may be considering options for managing your family's wealth. Do you currently have access to a network of families, entrepreneurs and thought leaders?

If you're contemplating a sale, you should assess how the deal structure might impact how you achieve your goals. Which deal structure will provide you with more tax benefits? The right post-sale strategy can help you to thoughtfully invest your after-tax proceeds, and reallocate your assets in line with your goals and transition to the next phase.

Whether you're just starting, growing or planning to exit, seek out solutions to help keep driving you and your business forward – with optimism and confidence.

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Matt Hansen is a Financial Advisor with UBS Financial Services Inc., 17180 Bernardo Center Drive, Suite 100, San Diego, CA 92128. Any information presented is general in nature and not intended to provide individually tailored investment advice. Investing involves risks and there is always the potential of losing money when you invest. The views expressed herein are those of the author and may not necessarily reflect the views of UBS Financial Services Inc.

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Wealth management strategies designed to help guide you through with confidence.

Matt Hansen, CFP®, CEPA®

Senior Vice President-Wealth Management
Hansen Wealth Management

(858) 521-7029

