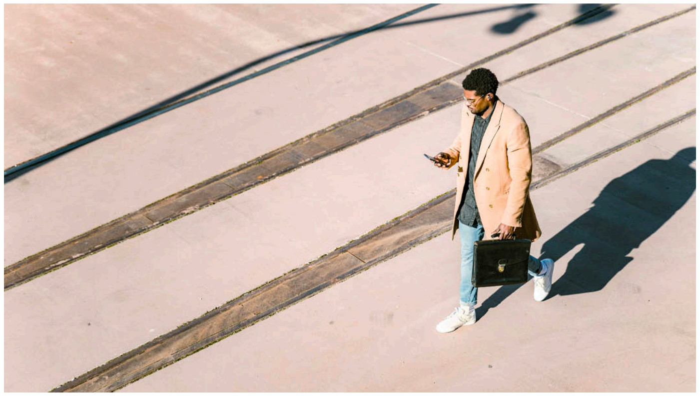
8 Figure Tax Savings

How we helped the founder of a subscription-based wellness company achieve 8 figure tax savings following the sale of their business



Founders Group

A proactive approach

– Like many business owners, our client was very focused on operating their company with little time to devote to exit planning

Challenge

– The founder came to us with a letter of intent from a strategic buyer and the goal of maximizing post-tax exit value

Strategy

– We first tackled our client's immediate liquidity needs and the threat this posed to their overall wealth and lifestyle. This meant navigating bespoke lending alternatives and the formation of strategic entities

– Our team designed a comprehensive pre-transaction plan, assembled a team of accountants and attorneys, and coordinated an expectation-exceeding execution

Outcome

– We delivered 8 figure tax savings along with a resilient strategy for building generational wealth

– Our client can now feel more confident about their overall wealth picture, knowing pre- and post- liquidity plans are in place

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