

CONFIDENCE IS POWER™

Structured Transitions for Business and Wealth

Financial Confidence™ provides **succession and exit planning**,
as well as mergers & acquisition services for business families,
business owners, executives and their advisors.



Seven Step Exit Planning Process™

What is Exit Planning?

A Roadmap – Exit planning helps you choose where you want to go as well as how to get there.

Experienced Guides – We assemble a team of trained and experienced advisors to guide you toward your business exit goals as you continue to run your company.

Implementation – Success depends upon a disciplined approach for business exit planning and coordination with experienced advisors for a successful exit.

Why Choose Us

Our **Seven Step Exit Planning Process™** will help business owners to:

- Successfully obtain exit objectives with an efficient and systemized succession plan.
- Benefit from a proven process used by thousands of owners who have exited their businesses.
- Expert attention to minimize taxes, reduce transaction risk and increase after-tax proceeds.
- Ensure you maintain control of your company until

you have attained all of your exit objectives.

Our Process

STEP 1 – BUSINESS EXIT PLANNING

We help you identify your business and financial goals:

1. Your desired departure date from your business.
2. The value that you want or need from the business.
3. The individuals or entities to whom you want to sell or transfer your business.

STEP 2 – YOUR BUSINESS AND PERSONAL FINANCIAL RESOURCES

We will project the future cash flow of your business, the future value of your business and non-business assets. Step 1 and 2 combined tell us the extent of the value or cashflow increase needed to meet your goals.

STEP 3 – BUILD AND PRESERVE BUSINESS VALUE

We make specific recommendations to help grow business value, protect existing value from the actions of others, and preserve company value by minimizing income taxes.

Financial Confidence™ Solutions

STEP 4 – CHOOSE TO SELL YOUR COMPANY TO A THIRD PARTY?

Choose this step to sell your company to a third party. We will design strategies to improve the likelihood of a successful sale, minimize the taxes you will pay, and maximize your sale price and terms.

OR

STEP 5 – CHOOSE TO SELL OR TRANSFER YOUR OWNERSHIP TO FAMILY MEMBERS OR INSIDERS?

If you choose to transfer your company to insiders, a detailed plan will ensure you receive the money you

desire, minimize the risk of non-payment and retain control until you are paid.

STEP 6 – BUSINESS CONTINUITY PLANNING

We coordinate your business continuity planning with your lifetime objectives to ensure that your goals are met, whether you survive to see your business exit or not.

STEP 7 – PERSONAL WEALTH AND ESTATE PLANNING

Our design emphasizes tax efficiency to ensure your family receives the amount of annual income necessary to satisfy the financial security goal you set in Step 1.



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To Achieve Your Unique Financial Planning Goals

Our mission is to help our clients enjoy the freedom that our unique Financial Confidence™ Program provides. We believe in building solid, long-term relationships with the people that work with us, as trust is an integral part of our business.



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