FCA
FINANCIAL CONFIDENCE ADVISORS

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Business Owner / Business Family

Are You Managing the Risks for Your Business?

OVERVIEW

The business owner / business family faces many complex issues. Often they need a risk assessment to implement succession plans that protect their wealth, their relationships and manage their unique business risks, family risks and personal risks.

These risks include growing their businesses, solving complex issues, transitioning leadership, securing their retirements, reducing taxes and developing efficient estate plans:

BENEFITS

We provide a collaborative approach that involves all of the business family's trusted advisors, including accountants, lawyers, counselors and business consultants to help solve the following:

- How do I ensure a successful succession plan?
- Who is best suited to fill my shoes?
- How can I set them up to succeed?
- How do we protect our assets through a transition?

Business Owner / Business Family Advisor Process	
STEP 1	**COMPLIMENTARY PHONE CONSULTATION** During this initial phone consultation, we will discover if there is a mutual fit and discuss the process to solve your business risks.
STEP 2	**DISCUSS BUSINESS GOALS AND OBJECTIVES** Establish contract, review document checklist and sign confidentiality agreement.
STEP 3	**DOCUMENT CHECKING AND FACT-FINDING** Gather information to clearly define your goals, needs and priorities including collection of all relevant documents and a questionnaire (family involvement is encouraged).
STEP 4	**CRITICAL ANALYSIS** Identify challenges, opportunities and solutions to your objectives. Review strategic document summary, risk assessment and summary of tax and estate planning recommendations.
STEP 5	**SOLUTIONS IMPLEMENTATION** We work with you and your professional advisors to implement plans to reach your objectives and obligations.

STEP 6	**CHECK UP AND REVIEW** We continue to meet with you on a regular basis to make sure the plan still meets your objectives and circumstances.

Over 30 Years of Trusted Advisor Experience

For over 30 years, Keith Brown has worked with hundreds of private corporations, self–employed individuals, business owners and business families to help them prepare for their futures and ensure business continuity. Keith Brown has fine–tuned a process that enables clients for the unique challenges faced by business owners. Our team of dedicated professionals can collaborate with your current professional advisors to assist families to prepare financially, mentally and emotionally for positive change.

Call Us to Learn More About Business Advice

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