



Foundational Business Planning

Services Offered:

Risk Management

- Risk Analysis
- Insurance Inventory
- Executive Summary w/ Objectives
- Liquidity Planning
- Financial Position Review
- Insurance planning

Key Objectives & Growth Planning

- Qualitative & Quantitative Goal Planning
- Board of Advisors
- Goal Planning
- Written Road Map w/ Action Plans

Legacy Planning

- Estate Planning

Fee for Service

- \$_____

Established Business Planning

Services Offered:

All Foundational Planning work, plus:

Risk Management

- Entity Structure
- Buy/Sell Agreement Funding
- Cash Flow Analysis
- Key Info & Legal Inventory plus Coordination with Outside Professionals (accountant, attorney)

Tax Planning

- Adjusted Gross Income Tax Strategies
- Income Tax Planning
- Coordination with Tax Professionals

Key Objectives & Growth Planning

- Cash, Capital & Debt Management
- Probability Analysis w/ Goal Adjustments
- Tax & Risk Diversification
- Business Transition Planning
- Key Employee Retention & Comp Strategies

Exit Strategy Plan

- Written Exit Strategy

Legacy Planning

- Lifetime Income Plan
- Identity Protection Plan
- Health Insurance Cost Strategies

Fee for Service

- \$_____

Complex Business & Exit Planning

Services Offered:

All Established Planning Work, Plus:

Risk Management

- Continuation Planning
- Access to Advanced Markets Consultant

Tax Planning

- Cost Basis Planning
- Business Transfer of Value Tax Strategy
- Tax Mitigation Strategies

Key Objectives & Growth Planning

- Board of Advisors Creation
- Business Value/Sale Strategies
- Liquidity & Bonding Strategies
- Social Security Strategies
- Employee Stock Option Plans
- Deferred Compensation Plans
- Capital & Debt Management
- Benefits Package Review Rank & File and C Level

Exit Strategy Plan

- Succession Plan
- Buy Out Strategy

Legacy Planning

- Charitable Gift Planning
- Estate Transition Planning

Fee for Service

- \$_____