

You've worked hard to build  
your business. **TAKE STEPS  
TO GET THE MOST OUT OF IT.**



Every business owner transitions out of his or her business eventually. Planning ahead and developing an exit and transition strategy for your business can help you maximize the benefits you receive. Your choices include:

- Liquidating for less than full value
- Hiring a business broker
- Exploring and creating exit and transition options

### **Explore your options**

Every business owner has transition options. We can help you:

- Control and prepare for distributions
- Explore opportunities that allow flexibility
- Develop options that could:
  - Improve your current situation
  - Accomplish current objectives
  - Prepare for the future transition

## Develop a strategy

Once a preliminary evaluation has been completed, more specific steps will be identified to establish a strategy.

- Your objectives will drive the transition process and define the strategies that are put into place to meet your needs.
- Your team of advisors will be part of the entire process and will each perform critical roles.
- Involve your family or other non-family parties to assist with an efficient transition.

Transitioning out of your business requires planning on several levels to secure its value. Some key areas that need to be addressed include:

- Employee benefits
- Business continuation arrangements
- Executive benefits
- Management transition and expertise
- Retirement objectives
- Lifetime transfers
- Estate distributions and obligations

**MAKE SURE YOU TAKE THE STEPS TO HELP SECURE THE VALUE OF YOUR BUSINESS BY DEVELOPING A TRANSITION STRATEGY TODAY.**

## WE CAN HELP

**Take the steps to enhance and secure the value of your business by developing a strategy today. By preparing your business transition strategy sooner, rather than later, you can help ensure time works on your behalf. Contact your financial professional to discuss your business transition needs.**

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