

What's important to you?

Please check the three items that are the most important to you or your business.

- Determining the best way to sell my business and retire
- Finding a way to sell my business to my top management team
- Looking for a way to maximize the value of my business
- Working through shareholder issues regarding ownership value and buy sell planning
- Working through family owned business issues and equity planning for siblings
- Protecting business from estate taxes at death
- Finding a way to allow my employees to become owners in the business
- Creating an Incentive Compensation plan for the top management
- Reviewing my management positions to see if they need overhaul
- Having a compensation study prepared to see if my management team is under or over compensated
- Rebuilding my culture to develop new goals, incentives, and performance accountability
- Development of an Executive Wealth Building plan to position them for future leadership in the business
- Review of my employee retirement plans to make sure that I do not have "fiduciary liability" exposure.
- Review of my 401(k) and other retirement plans to see if service, fees, and investment options and guidance are current with today's top providers.
- Review of my corporate life insurance to see if values current and costs are competitive with the marketplace
- Looking for ways that the owner can build more wealth outside of the business on a tax efficient basis.



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