

Financial Planners *for* Small Business Owners

LET'S MAKE A PLAN

Do you ask yourself

WILL I BE OKAY?
HOW MUCH IS MY BUSINESS
WORTH?
WILL IT BE ENOUGH WHEN I
SELL IT?

You are not alone. Let's make a plan.

What matters most
to you?

Your
relationships

Your values

your dreams...

Plan

- Identify who and what matter most to you
- Set goals in alignment with people and values that are most important to you
- Gain clarity and focus

Act

- Make a decision to act on your plan
- Implement your plan and commit to the process of ongoing planning
- Set your plan in motion

Monitor

- Monitor your plan and keep it on track
- Adjust your plan to changes around you
- Give yourself a favorable chance to achieve your goals

You'll have a cohesive **plan** that is **executed** properly and **monitored** regularly.

Leave the details to us

We'll help take care of boring stuff like...

- other major events
- Investing in alignment with your goals
- Minimizing your tax bills
- and business from the unexpected
- Making your money last in retirement
- your spouse or your parents) in the latter part of life
- Transferring assets to heirs efficiently

We have **seasoned and **credentialed** advisors to guide you.**

Advisory services offered through CS Planning Corp, an SEC registered investment advisor.

Business exit planning and insurance services offered separately from and independently of Cultivant LLC or CS Planning Corp.

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