

PLANNING, intentionally and by design

Your succession plan is not about your flight plan so much as your launch pad for your business. Your strategic vision for your eventual planned or unplanned exit from the business will affect its future success.

Winging it isn't how you built your reputation and relationships – hard work and planning got you where you are today and motivates you on how you want your tomorrow to look.

Succession planning provides you with an opportunity to value and sell your business to the successor of your choice so that what you have worked so hard to build has a chance to stay that way.

Questions to ask yourself:

- Does your firm have a succession plan available where you make the legacy decisions/choice?
- How do you know if your practice is ready for you to step aside?
- What are the risks to your current plan? Do you want more options?
- Are you ready to buy or sell?
- Is your current purchaser able to financially pay a full valuation?
- Will your clients accept the new advisor and approach?
- Is your plan DOL proof?

Questions?

Contact us to learn how we can help you design your future. ([/contact-us](#))

CONTACT US FOR A FREE BUSINESS VALUATION

First Name:

Last Name:

Company:

Phone:

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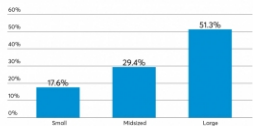
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Source: Accounting Today Research

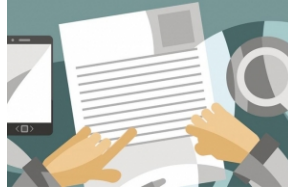
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