

## How I Can Help

To help create your Exit Plan, we coordinate your advisors and implement your Plan based on your timetable. As members of the **BEI Network of Exit Planning Advisors** we know how to guide you to your successful exit. Using a systematic Exit Planning Process developed over the last 25 years, you decide:

- When you wish to leave your business
- What amount of cash you need when you exit and
- To whom you want to transfer the business.

Our Exit Planning Process is a process, not a product. I am not vested in promoting a particular goal. Instead, I work to identify and accomplish **your** goals. The system works because it is a customizable process that takes you to the successful exit **you** desire.

### *Are your advisors asking you about your plans for a successful exit?*

Most advisors don't because they simply don't know that there is a proven Exit Planning process. Good Exit Planning requires the coordinated efforts of a number of advisors – minimally a CPA, Attorney, and financial or insurance professional. Working together as your Advisory Team, advisors skilled in Exit Planning can help you achieve your exit goals.

## How I Work

As a trained Exit Planning Advisor:

- In an inter-disciplinary Team of Advisors. I know that a successful exit is the product of trained, experienced professionals who work together to meet your Exit Planning goals.
- By creating an owner-centered Exit Plan based on your goals, objectives, and concerns.
- Our fees are based on the creation and implementation of a written Exit Plan.