

BUSINESS OWNER EXIT PLANNING

Exit Planning is the creation and execution of a strategy that enables business owners to exit their businesses on their terms and conditions. The ultimate transfer may be to family, employees, or outside parties.

Proper Exit Planning allows you to exit when you want, for what you want (or for what you need, if greater), and to the successor you want.

Ideally, planning should begin years in advance of your intended exit date.

The process starts with defining and refining your exit goals. As part of your transfer team, we will analyze your situation to determine what you will need to meet your post-sale lifestyle goals. And then help you prepare your company to get maximum value when the time comes to transfer. Finally, we will provide advice and guidance through the actual transfer process.

All owners will exit their business someday, whether planned or unplanned. A planned exit will be the most rewarding for you, your family, and your employees.

What We Do

- Review and explore your exit planning objectives and options.
- Develop a financial plan that includes a retirement/financial needs analysis.
- Develop a team and a strategy that will help you increase value in your business with a goal of maximizing the ultimate sale price.
- Work with you to design a plan to successfully exit your business (whether to family, to management, to a third party, or to an ESOP).
- Help you create a continuity plan to safeguard your family and your company in the event of your death.

Business Owner Exit Planning Services are offered through Baldwin & Clarke Advisory Services, LLC (BCAS).

BCAS is a Registered Investment Adviser with the United States Securities and Exchange Commission (SEC).

Additional information about BCAS is available on the SEC's website at: www.adviserinfo.sec.gov, using CRD #105666.