BaldwinClarke

— Planning has its rewards. —

PRE-TRANSACTION PLANNING

We help clients thoughtfully prepare for one of the largest and most meaningful financial transactions of their professional lives. No one business is the same and not all businesses are built and managed in a fashion that allows them to be seamlessly transferrable to a new owner. Helping clients create transferable businesses is what we do.

The successful sale of a business takes time and places many additional demands on business owners beyond simply running their business well. Most often, receiving optimal value for your business does not involve pursuing the first offer that comes across the transom. Rather, true market value is a product of planning, preparation, and process. It occurs when opportunity is balanced against prudent and well understood risk.

To achieve a premium outcome while avoiding a failed transaction, we help and guide clients with pre-transaction planning and analysis so they can be proactive and responsive for when favorable market conditions align with their personal timing.

What We Do

- Explore and help define goals and objectives for a successful transition.
- Review personal estate planning readiness.
- Discuss personal and professional timetables and “next chapter” plans.
- Risk assessment and due diligence planning.
- Financial reporting and valuation analysis.
- Comprehensive financial modeling.
- Sales and growth planning.
- Market intelligence.

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