



BUSINESS PLANNING STRATEGIES

NAPKIN CONCEPT SCRIPT

SCRIPT – BUSINESS PLANNING SOLUTIONS

“**TODAY** you own your own business, but do you have a plan when it is time to **EXIT**”?

“As a business owner, you are focused on running your business. Each day brings new challenges, opportunities and the need to make a great deal of financial decisions. In addition to growing your business, it is never too early to start thinking about how you would like you would like to exit the business. This will allow you to plan now so you can exit or step back when you want to – not when you have to.” *(circle Business growth and Retirement/Stepping Back)*

“At the same time, you will want to provide some kind of retirement plan for the people who work for you *(circle Retirement Plans)*. Some of those employees are probably critical to the ongoing success of your business. You will want to make sure you reward them and give them incentive not to leave you for your competitor *(circle Executive Compensation)*. In addition, you need to protect your business should there be a premature death of one of these Key Employees“ *(circle Key Person Protection)*.

Eventually you will hand over the business you’ve built to someone else. Possibly to a family member, key employee or even an outside sale *(circle Business Succession)*. Together we can begin to plan now so this is an easier transition for you in the future. We will be sure that your plan passes your accumulated wealth to your heirs and allows you to leave a legacy *(circle Estate Planning)*.

“All of this at one time can paralyze a business owner. However, ignoring these issues won’t make them go away. You need answers to questions that are critical in the decision-making process. Business owners don’t plan to fail, they fail to plan.”

“If we decide to work together, in one visit we can determine which of these concerns is most important to you. As we create a solution for that issue, we can address your other concerns. Eventually we will have strategies in place to help protect....

...you, (make a checkmark next to “**You**”)

...your family, (make a checkmark next to “**Your Family**”)

...your employees, (make a checkmark next to “**Your Employees**”)

...and your business.” (make a checkmark next to “**Your Business**”)

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BUSINESS SOLUTIONS
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