

You're In Charge®

4 Areas of Planning

Entity Planning

- Valuation
- Cash Flow Working Capital
- Financial Leverage
- Tax planning C vs. S
- Opportunity for Growth Risk in Industry – Barrier for Entry
- Risk Management
- Bridge to Personal Financial Plan

Executive Compensation

- Key Employee Retention
- Deferred Compensation –
 Synthetic Equity
- COLI
- Optimize Pension
- 3.8% Surtax Planning
- 1031 and 1035 Exchanges

Employee Benefits

- Group Benefits
- Health Care Reform Health Benefits
- 401(k) Plan
- Long Term Care
- Disability Income

Business Succession

- Bench Strength for internal succession
- Exit Planning
- Buy Sell
- Keep Sell
- No B/S (Children Business)
- No B/S (Partner)
- Stock Red vs. Cross Purchase
- Wait & See Buy/Sell
- Equalization Business to Children
- Financial vs. Market Researching
- Value Gap
- Management Succession
- FSOP

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