

*Take Control of Your Business Exit and Your Financial Future*

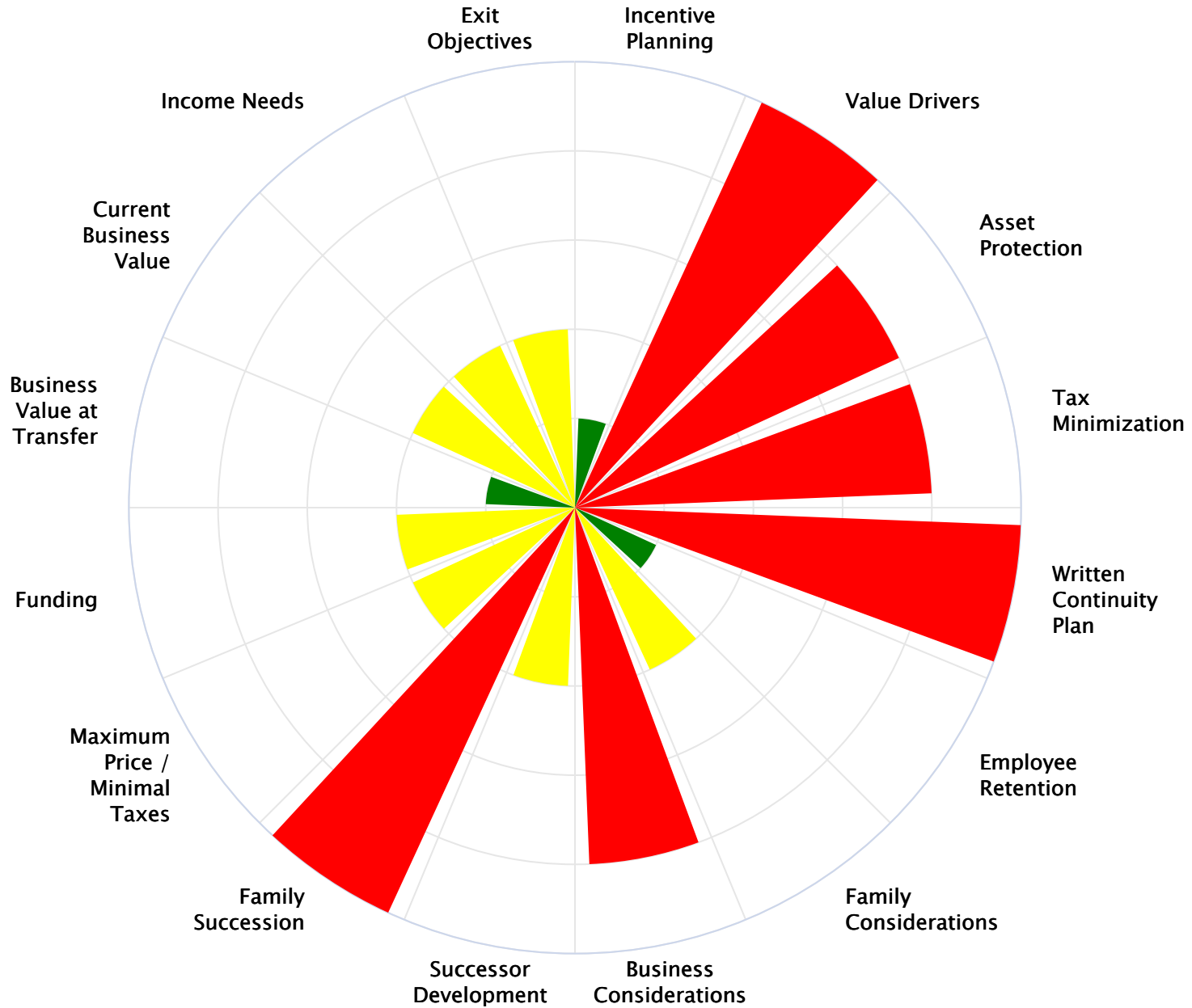
# EXIT PLANNING ASSESSMENT

*FOR SAMPLE REPORT*



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# Your Exit Planning Priorities



# Understanding Your Priorities

The Exit Planning Assessment is intended to organize and emphasize your most critical priorities. We use this information to work with you in the development of a customized action plan to address your unique goals, interests and concerns. Our approach is consistent as we begin work with each of our business owner clients: focus on the client's priorities and objectives. That being said, we take a comprehensive view toward all of the work that we do, so as your needs and circumstances change, we are able to respond with customized attention and guidance. Read more below to learn about how we address your top issues, and to compare your most critical planning topics with those that are viewed as important to other business owners.

## **Your Top Priorities...**

### **Value Drivers**

We help you focus on the strategies and techniques that are likely to have the greatest impact on the value of your business in order to facilitate your ultimate exit on your terms.

### **Asset Protection**

The planning techniques that we identify, evaluate and implement through input and feedback from you and your Advisor Team both directly and indirectly incorporate elements that protect the business and personal assets that you have worked so hard to create.

### **Tax Minimization**

The value that you are able to derive from your business will suffer if the tax consequences of your most important operations are not known and managed. We work closely with your Advisor Team to design and implement strategies that minimize tax consequences in order to maximize the financial resources that are available to you.

### **Written Continuity Plan**

A written continuity plan can give you peace of mind and reassurance that in the event of your death or disability, your business and ownership will follow the path that you believe is best. While our process emphasizes planning during your lifetime, we believe that a comprehensive plan requires both lifetime and continuity planning.

### **Business Considerations**

Our comprehensive approach converts your objectives for the treatment of the business after your death or disability into concrete planning techniques.

### **Family Succession**

Family-owned businesses and the passing of the business from one generation to the next require unique planning strategies that integrate your business, personal, financial and emotional interests. We evaluate all relevant factors in our comprehensive process.

## **You are somewhat concerned about...**

### **Family Considerations**

You, like many other business owners, want to address the impact of your death or disability on your family as well as your business. Through integrated planning strategies we help you increase the likelihood of achieving your business, personal and family goals.

### **Successor Development**

You can transfer your ownership with confidence when you feel that your successor has the skills, experience, temperament and motivation to succeed. This is why our planning process addresses development and measurement of your successor's readiness.

### **Maximum Price / Minimal Taxes**

We share your interest in designing strategies that result in maximum value and minimum taxes in connection with any ownership transfers you make. We measure the success of the planning process based on your ability to achieve your goals in this area.

### **Funding**

Our planning system uses the unique information about your business to identify and leverage all possible funding resources to support your exit objectives.

### **Current Business Value**

An accurate assessment of the current value of your business provides an essential element to the start of the planning process. We use initial business value to measure the extent to which you need to build business value, if any, and benchmark progress through the life of your plan.

### **Income Needs**

The likelihood that you will achieve financial security is highly dependent on first defining what financial security means for you. Your unique financial requirements tell us what your business must produce, in terms of income and value, to support your financial goals. This analysis plays an integral role in our process.

### **Exit Objectives**

Our process is a systematic approach that applies a consistent set of steps to each of our business owner clients, but results in a unique, customized outcome for each individual based on your objectives and the resources that are available. We work with you to refine your objectives in order to create a clear target outcome for you.

## **But let's not overlook...**

### **Incentive Planning**

Your employees should be one of your most valuable assets. Your ability to motivate, reward and retain them has a direct impact on the value of your business and your ability to succeed in reaching your goals. We integrate key employee incentive planning into your overall planning strategies.

### **Employee Retention**

We understand that continued involvement by certain employees in the event of your death or disability will facilitate a smooth transition of ownership and leadership in your business. Therefore, we always consider employee retention techniques as part of continuity planning.

### **Business Value at Transfer**

The target business value that you want or need to realize plays a crucial role in our planning process. We use that information to design unique planning strategies to achieve your business value objective and to measure whether your efforts are successful.