We’ll get you there.

CPAs | CONSULTANTS | WEALTH ADVISORS

Panel Discussion: Supporting Business Owners Through Their Transition – Planned & Unplanned

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Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor.

In this session, you will:

LEARN ABOUT THE PROCESS YOU CAN TAKE YOUR BUSINESS THROUGH TO PREPARE FOR A TRANSITION – PLANNED OR UNPLANNED

UNDERSTAND WHY BEING PREPARED TO TRANSITION YOUR BUSINESS AT ANY TIME IS GOOD BUSINESS STRATEGY

LEARN THE 4 CRITICAL AREAS A BUSINESS OWNER NEEDS TO CONSIDER TO HAVE PEACE OF MIND

Who are your presenters?

- Brian Kleist, CFP
- Bethany Hearn, CPA/ABV/CFF
- Marcus Bowman, CPA/CEPA

The Three Areas of Readiness

Personal

Personal Financial

Business

Personal Readiness

Personal Readiness

- Reduce risk to the business and the owner’s future
- What is next?
- Does the business owner understand all their options?

The 5 Ds

Death

Divorce

Disability

Distress

Disagreement

What is next?

Is the owner going to something?

Does the owner understand all their transition options?

Both internal and external

Personal Financial Readiness

Personal Financial Readiness

WILL YOU HAVE ENOUGH?

WHERE IS YOUR MONEY?

IS YOUR WEALTH PROTECTED?

About CLA

Top 8 professional services firm with 120+ U.S. locations

Seamlessly integrated business lines

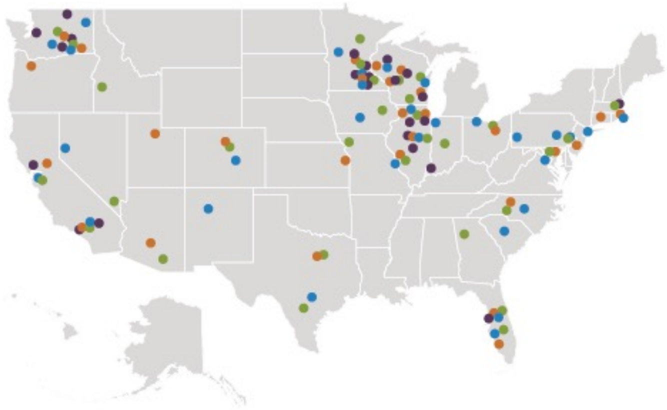
wealth advisory | outsourcing | audit, tax and consulting | digital

Investment advisory group with more 100 professionals and more than $10 billion in assets under management.

16 specialized industry verticals

CLA serves a thousands of privately held businesses and owners

CLA Global- International network of resources and capabilities



Aligned With Your Success

Your best interests always come first

We provide unbiased advice

We are a salary based registered investment advisor

Our fee is charged based on assets under management

Personal Elements to Succession Planning

We Help You Identify & Work Towards Your Goals

What does my current financial picture look like?

How can I preserve my wealth and remain financially secure?

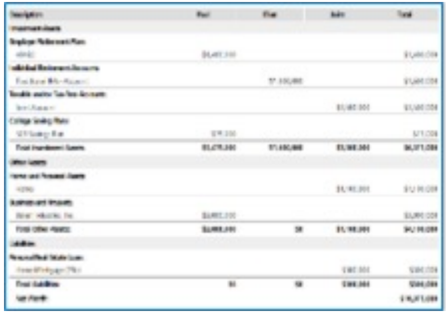
Do I really have *enough*?

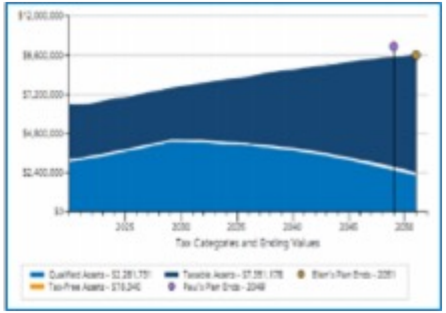
How can I grow my wealth for the next generation?

Are there tax planning strategies to save us money?

What happens to my money after I die?

Financial planning snapshot





A Seamless Approach

Your CLA wealth team

+

Your CLA tax team

- Charitable planning
- Financial planning
- Investment advisory
- Tax planning & preparation
- Trust and estate planning
- Family legacy planning

Our clients

Financial Planning Drives Your Strategy

No road map for wealth accumulation follows the same path. That's why our promise is so important: we can't help you unless we know you, and these five steps serve as the basis of our approach.

- Identify and prioritize your goals
- Analyze and evaluate your assets
- Strategize and develop a plan
- Activate and implement your plan
- Monitor and adjust your plan

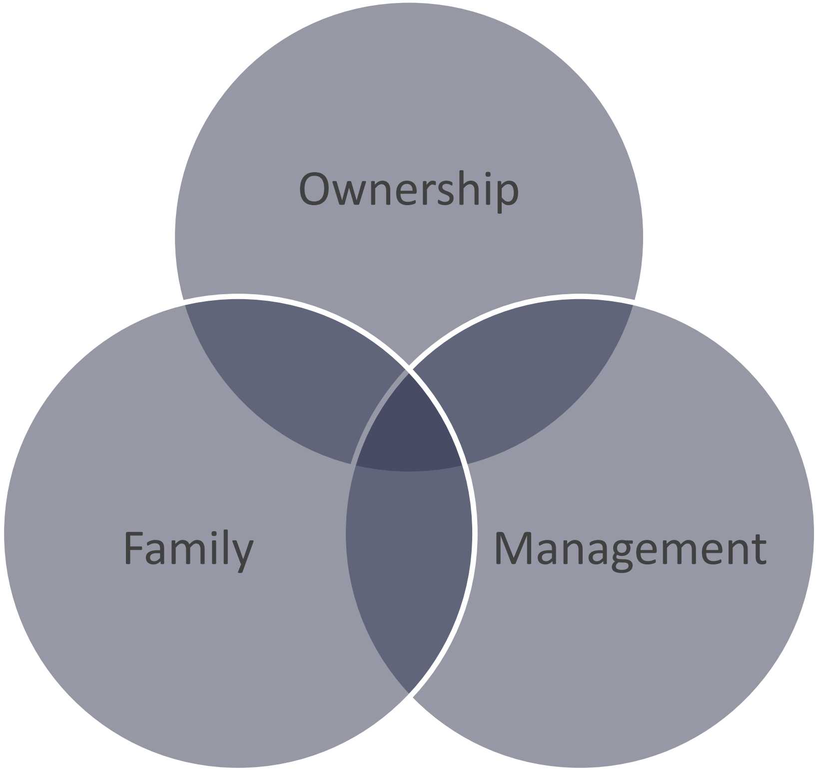
Business Readiness

Business Valuation

It is about more than just numbers…

Business Valuation

Decision-making



Team Approach

Advisory Team

- Owner transition advisor
- Quality of earnings
- M&A/Investment banking
- Talent solutions
- Tax professional
- Wealth advisor
- Valuation
- Gift estate and trust
- Bankers
- Others as necessary

The 4 worries

Will I have enough?

Will my business be ok?

Will my family be ok?

Will I be ok?

Conclusion

Help the owner of your business to transition their business strong and leave on their own terms!

Questions?

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