

4 Stages of Preparing to Transition

- External or internal forces have triggered the owner to activate the process and jump into action to be transition prepared. Sometimes owners are personally ready to transition but their businesses are not. Our role is to help you look at the different possibilities with the right information to make the best decision.

Activated

- Business owners focused on growth, scaling the business, and seeking new planning methods and tools to drive execution of their plan. Our role is to help you develop the right strategies, successfully implement these new methods, and ensure successful execution of your plan.

Builders

Pivoters

- Owners ready to invest to go to the next level, maximize business enterprise value, and prepare the business for a transition or sale. Our role is to quickly help you focus on the right steps to have the greatest impact on the value of your business.

Explorers

- Owners seeking and investing in education, knowledge and clarity on options to transition to achieve and maximize greater enterprise value. Our role is to educate you to make the best decision for your business and family.