

## MISSION:

*Adding resilience and value to America's businesses for the good of all; the business, owners, employees and the communities that count on them, now and in the future.*

## WHAT WE DO:

We provide privately held businesses and their owners their true north; a multidisciplinary approach to help them achieve their goals:

- Business planning for growth, exit and/or operational excellence.
- Financial preparedness and readiness.
- Alignment of personal and business goals.
- Business continuation planning.
- Leadership team alignment.

Using a network of expert collaboration, all within a common methodology, we can provide business owners the direction they need to achieve their goals.

## THE STARTING POINT:

What is your primary business goal:

- ☐ To grow the business
- ☐ To sell the business
- ☐ To strengthen operations

Do you have a successor identified should you need or want to step away for a while?

☐ Yes ☐ No

Do you have a personal financial plan that dovetails your business as an asset with your personal goals?

☐ Yes ☐ No

Have you had your business value estimated in the past year?

☐ Yes ☐ No

Could you go away for an extended period of time and be assured that your business would run smoothly without you?

☐ Yes ☐ No

Is your leadership team in step with your vision and goals, and does it have the ability to act in your behalf?

☐ Yes ☐ No  
☐ Sometimes

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**ACTIONS & INSIGHTS TO HELP YOU ACHIEVE YOUR GOALS****DISCOVER**

For any goal, establishing a baseline is important. In Discover we'll determine your enterprise value, your potential value and the quickest way to close much of that gap. We'll also introduce you to the Value Drivers methodology.

**ALIGN**

Get everyone on the same page and rallied around the vision and goals of the business. When key people are given input and a forum for discussion, you'll find they are more engaged and ready to own the solutions, leading to greater productivity and profitability.

**SAFELIST**

Protect your business, employees and your legacy when you begin to think about a successor. Ask yourself, "If I wanted or was forced to step away for an extended period, what would happen to all I've built, my company and my family?" The time to prepare for a black swan event is before it happens.

**PROTECT**

Your business is your most valuable asset. It represents all that is important to your financial and personal goals. But it is also an asset that is full of risks and demands. Here we'll mitigate the risks and make sure you're financially ready for what comes next.

**ROADMAP**

Take the opportunity to lay out your goals, timeframes and important initiatives according to your priorities. Roadmap is your "scope of work" to ensure everything is on track and on time.

**GROW**

Dive deep into business planning, tailored to your goals. You'll learn what it takes to build a solid foundation for those goals, along with actionable tasks and a concrete ROI for your efforts.