

BUSINESS OWNER SUCCESSION PLANNING SERVICES



Peace of Mind for You and Your Family

Transferring ownership and management control of a business can be complex. A business owner should consider the financial goals and implications of the transaction as well as the emotional and human impacts it will have on the owner, the owner's family, and the employees. A succession plan should be in place and updated regularly to be ready for retirement, death, disability, or other unforeseen events. Issues that need to be considered include:

- How to assess the fair market value of your business
- How to transfer to family members, key employees, or sell to outsiders, and help ensure successful continuation
- How to structure the transfer to meet personal financial objectives and minimize adverse tax consequences

Our Approach to Help You Transition Successfully

Dalby, Wendland & Co., P.C., has developed a comprehensive approach to address the issues businesses and business owners must consider in a transition. We will help you to:

- ⇒ Identify critical management succession issues
- ⇒ Recognize how the transaction will contribute to the personal financial goals and how it might impact your lifestyle
- ⇒ Judge how the transaction might impact estate planning objectives
- ⇒ Make sure the business strategy and plan drive value and personal income
- ⇒ Understand the impact on the business before and after the transaction
- ⇒ Consider the emotional and human issues that surround a sale or transfer
- ⇒ Construct a highly-skilled team of professional advisors who will work together to meet your succession planning needs

Our process includes:

Situation analysis	Personal financial planning	Business & strategic planning
Management succession planning	Ownership transition planning	Estate planning

You have worked hard to make your business successful. Talk with one of our professionals to help you find peace of mind when it's time to exit your business for the next stage of your life.



DALBY, WENDLAND & CO., P.C.

CPAs and Business Advisors

www.DalbyCPA.com

Aspen 970-925-1831

Glenwood Springs 970-945-8575

Grand Junction 970-243-1921

Montrose 970-249-7701

Rifle 970-625-1392

Telluride 970-249-7701