

# Business Succession Planning Services



Implementing an exit strategy for your business involves navigating a complex, multi-faceted planning landscape. Understanding how a business succession plan can be structured and the techniques and strategies that will prioritize your objectives can give you confidence that your plan will help optimize the end result and prepare you for what's next. With years of experience in estate, trust, tax, and business succession planning, Peak is well positioned to provide this guidance, offering a holistic approach in assisting you with all aspects of your succession plan.

**The integration of business succession and personal wealth management goals is critical to help safeguard a seamless transition, preserve wealth, and provide a lasting legacy. Peak can assist with the following interrelated services:**

- We can model the prospects of each succession planning option by providing reports showing the benefits and drawbacks of the following:
  - **selling the business on the open market** to maximize value,
  - **transferring shares or business interests to family members** over time, or
  - **bringing on additional partners or shareholders** to provide liquidity and continuity.
- If minimizing as much tax as possible is a top priority, we can illustrate **techniques both prior to the sale and post-sale that could help mitigate capital gains and estate tax**. Strategies we might consider, discuss and model include:
  - tactical gifting,
  - Qualified Small Business Stock (QSBS) exclusion planning,
  - transferring non-controlling, non-marketable business interests through leveraged valuation discounts, and/or
  - sophisticated trust and charitable or foundation planning.
- **We integrate any business succession planning with retirement planning, estate planning and personal wealth management goals**, so all planning is comprehensive and coordinated, and accomplishes multiple objectives.
- Because no financial plan is static in nature, **Peak updates your financial plan as your circumstances, goals and decisions change**. Your business succession plan should never take place in a vacuum.
- Peak works in concert with your outside professionals, such as attorneys and accountants, to streamline this complex process. We are well situated to be the **“quarterback” of your business succession planning team** to ensure a unified and cohesive strategy exists.

**It took years of hard work to build your business to this point. Let Peak Asset Management help guide you through the exit and beyond with an experienced, holistic, and detailed approach.** Contact us today.

Jason Foster, JD, AEP®, Director of Wealth Strategies & Legacy Planning

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