

The Transaction Guide

Division of Assets - Business may be separated from Real Estate, etc. or not. Use the guide for each asset segment

Exit While Living?

Yes

No

Transition to an Insider

Liquidation Strategy

Transition to a 3rd Party

Gifting Strategy

Sale Strategy

Of the Assets

Of the Entity

Already has wealth to meet financial objective

Use of a Business Broker or Investment Banker may be appropriate

Reason for purchase may be strategic or financial

- Pass business on per Estate Plan
- Set up Death/Disability Buy/Sell funded by life insurance
- Set up Corporate Governance Structure
- Liquidate

Contingency Options

- Fully funded Buy/Sell - Death/Disability
- Stay Bonus for potential 3rd Party Sale

Contingency Planning - Risk Timeline



Learn more at www.transitionstrategists.com
 Listen to The Business Transition Roadmap podcast on Spotify and Apple Podcasts

the Transition Strategists **TRD**
 Transition Roadmap Developer

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