The most significant financial event for most business owners is when they chose to exit from their business. With the proper planning, we will develop a plan to maximize and protect your business value for when you do choose to transition your business.

Exit planning seeks to ensure that owners leave in a manner that protects them, their family, and their business. When conducted by experienced professionals, it allows an owner to identify and achieve specific personal, financial, and estate planning goals.

Proper exit planning enables a business owner to have an element of control over:

THE EXIT PLANNING REVIEW™

O'Brien Riley & Ryan, P.C.

Building Value is the Win-Win-Win of Exit Planning

Click to join our mailing list.

- When you want to leave the business;
- Achieving maximum after tax value;
- The survival of the business in case you don't;
- Financial security of the family.

Exit planning helps an owner answer the following questions:

- Do you know your retirement goals?
- What it will take, in cash, to reach them?
- Do you know how much your business is worth today?
- Does the business have the attributes or value drivers that will attract a large pool of buyers or make your legacy sustainable?
- Do you know how to minimize taxes in a third party sale?
- Do you know how to maximize your return, minimize taxes, shorten the timeline and minimize risk when transferring to family members or management?
- Do you have a formalized Business Continuity Plan that ensures the business survives in case you do not?
- Do you have a financial plan and an estate plan in place to secure the financial independence of your family?

If you are considering selling, transferring, or closing your business now or within the next five years, you should be speaking with Dan O'Brien, our Exit Planning partner. Also, join the newsletter mailing list to receive the twice-monthly exit planning newsletter, and be sure to check out our exit planning whitepapers, which are free to download.

Contact Us