

Business Owner Solutions

The Challenges Business Owners Face

The industry has it all wrong. You have multiple advisors working on individual areas of your business and personal wealth but no one collaborating on all aspects of your plan. Our business services coordinate the wealth management, consulting and execution services, addressing the problems caused by nonalignment.



Advanced Planning

How will I know if I can achieve financial independence?

Am I doing all I can to minimize the IRS tax bite?



Valuation Estimate

What is my business (really) worth today?

How can I increase the transferrable value of my business?



Business Consulting

How can I grow and protect my business?

How can I attract, retain and reward key employees?



Execution Services

How do I best tap into the wealth of my company?

Which market is available for my business?

Look at Your Business from the Eye of a Buyer

The Business Owner Solutions team helps successful business owners look at their business from another angle. In your eyes, your business may well be like your baby, but to those on the other side of the transaction, it could look a lot different.

The buyer perspective is one of the keys to identifying issues that are limiting the potential value of your company. We will help you organize and implement a plan that takes you from growth through exit while staying aligned with your goals.

Our Approach

Whether you are behind on your revenue goals, looking to make your business easier to run, or preparing your exit strategy, there is one crucial component needed to make it happen – Growth.

Our Business Accelerator program is designed to help take you from growth to exit as seamlessly and profitably as possible. Even if your exit is a decade away or more, it is important to start planning now, for both optimal outcomes and the unexpected.

Our Three-Step Growth to Exit Process

Think of your business as a car. Cash is the fuel to the business engine: without it, you can't move the business forward to create the growth needed. The gears inside the engine drive growth and equity value, and all need to work in concert with each other to reach the business's potential

Step 1.

Predictable Profits and Cash Flow (Value Capture)

Analyze profit drains and discover the actions in your business that enable you to generate more revenue. In this stage, we focus on creating a plan of action to fill in the gaps and make your business easier to run. Sometimes a few small changes can make a huge difference in eliminating the biggest drains on your profits.

Step 2.

Sustainable Growth (Value Creation)

With the confidence that comes with predictable profits and cash flow, you are better able to deliver aspirational revenue and value. Here we develop a plan to increase Confidence in the Value Drivers that are critical to creating Sustainable Growth. Simply put, it's the ability to grow without chaos.

Step 3.

Defendable Equity Value (Value Realization)

Predictable profits and cash flow give the foundation for sustainable growth, which then enables you to advance the Equity Value of your business, keep it strong, and fund your family wealth. Demonstrating a process that you have implemented over multiple years to evaluate the business and show how the business has improved will make the value that has been captured and created more defendable.

Solutions for Closely Held Businesses

Entity Planning

- Valuation Estimate*
- Cash Flow - Working Capital
- Financial Leverage
- Tax Planning
- Value Drivers
- Business Owner Personal Plan

Key Employee

- Key Employee Retention
- Deferred Comp. - Synthetic Equity
- COLI

Employee Benefits

- Group Benefits
- Qualified Plan
- Long Term Care
- Disability

Business Succession

- Buy/Sell
- Bench Strength for Internal Succession
- Financial Leverage
- Model Exit Options: Internal/External
- Equalization Business to Children

*Clients are referred to Pinnacle Equity Solutions for an estimate of business valuation. Neither LPL Financial, Integrated Partners or Integrated Financial Partners offer business valuations. Pinnacle Equity Solutions, Integrated Partners and LPL Financial are separate entities. Securities offered through LPL Financial, member FINRA/SIPC. Investment advice offered through Integrated Financial Partners, a registered investment advisor and separate entity from LPL Financial.