

Owner Planning Questionnaire

1. Have you decided:
 - When you want to leave your business?
 - What amount of cash or annual cash flow you will need when you exit?
 - To whom you want to transfer your business?
2. Based on future cash flow, do you know how much your business is worth today?
3. Do you know how to best maximize the income stream generated by your ownership interest—both before and after you leave your business?
4. Do you know how to sell your business to a third party and pay the least possible taxes? Do you know if your business is even marketable?
5. Do you know how to transfer your business to insiders (family, employees or co-owners) while paying the least possible taxes and enjoying maximum financial security?
6. Do you have a plan for your business if the unexpected happens to you?
7. Have you taken steps to protect your family's wealth?

About the Firm

Gary B. Garland, Esq. has been practicing law for nearly 15 years, handling complex litigation and Estate Planning, Estate Administration, and Business Succession Planning issues.

We maintain three offices for your convenience, located in Freehold and Manchester, New Jersey, as well as in New York City.

Member, New Jersey and New York Bar Associations.

Member, National Academy of Elder Law Attorneys.

Board of Directors, Society for Financial Service Professionals

Member, Estate and Financial Planning Council of Central New Jersey

Member, WealthCounsel LLC

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Thinking about getting out of your business?



Is your wealth locked up in your company?

Are you wondering how to convert the value of your company into cash?

Does the very idea of exiting your company seem overwhelming... yet exciting?

WE HELP BUSINESS OWNERS
ANSWER THESE QUESTIONS
EVERY DAY.

Presented by Gary B. Garland, Esq.
www.estateattorney.info

Business Succession Planning and Exit Strategies

You are not alone

If you have thought about leaving your business but don't know how to begin, you are in good company. Over 50% of successful business owners hope to exit their companies within the next five years. Unless those owners have an appropriate Exit Planning Strategy, it is doubtful that they will exit in style.

Three elements of a successful exit

To exit successfully, owners need:

- **A road map.**

Exit Planning is a process that helps owners decide where they want to go as well as how to get there.

- **Experienced guides**

Owners must assemble a team of trained and experienced advisors to guide them through choices and decisions as they work toward their exit goals.

- **Implementation**

Success depends upon a disciplined implementation timetable keyed to an business owner's Exit Plan.

[We can help you navigate your exit in style!](#)



Exit in style— a guide is crucial!

Without experienced Advisors, an Exit Plan and an implementation timetable, the chances for a successful exit are slim.

How we can help

To help you create your Exit Plan, we coordinate your advisors and implement your Plan based on your timetable. Using our systematic Exit Planning process, you decide:

- When you wish to leave your business;
- What amount of cash you need when you exit;
- To whom you want to transfer the business.

Our Exit Planning system is a process, not a product. We aren't vested in promoting a particular goal. Instead, we work to identify and to accomplish your goals. Our system works because it is a customizable process that takes you to the successful exit you desire.

The Garland Advantage

We strive to provide our clients with the highest caliber legal services tailored to meet their unique goals. Clients who retain our firm benefit from our

- Access to updated tools, the latest information, and state-of-the-art design ideas for their Plan;
- Team approach with other advisors;
- Ongoing education to stay at the cutting edge of Exit Planning strategies and techniques.

Are your advisors asking you about your plans for a successful exit?

Most advisors don't because they simply don't know that there is a proven Exit Planning process. Good Exit Planning requires the coordinated efforts of a number of advisors— minimally, a CPA, an attorney, and a financial or insurance professional. Working together as your Advisory Team, advisors skilled in Exit Planning can help you to achieve your exit goals.



What does the future hold for your business?

How we work

As trained Exit Planning Advisors:

- We know that a successful exit is the product of trained, experienced professionals who work together to meet your Exit Planning goals;
- We create owner-centered Exit Plans based on your goals, objectives and concerns.
- Our fees are based on the creation and implementation of a written Exit Plan.

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