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## Business Owners

*We enjoy working with business owners who seek balance in their work and personal lives.*

You've worked a lifetime, raised a family and built a business; planning for succession of your business and a successful retirement should be easy. It's not. With the complexities of owning and managing a business most people don't have the time or the expertise to plan well for the eventual transfer of their business, let alone a retirement plan that is based on their values and life goals.

Our focus is helping you protect the value of your business as well as ensuring the financial security and success of you and your family. We help you discover and define your business and life goals so that you can effectively balance life and work effectively.

Have you asked yourself...?

- What will 'retirement' be for me?
- What 'legacy' do I want to leave my children?
- How can I effectively and efficiently leave my business?
- How will I manage the transition from business owner to retirement?
- Have I established a proper retirement from my business?
- How do I protect my family and my life from the unexpected?

As your Financial Architect, we work with you to define your vision for the succession of your business and your life in retirement. We help you prepare for it as best you can.

We ask the hard questions, questions that will get you thinking about the important things in your life; your dreams, values and goals. We'll help you discover and define what retirement means to you. Regrettably, few financial professionals ask the hard questions, few commit to a comprehensive client centered process.

With proper planning, we'll help ensure...

- your lifestyle and business are protected
- you set aside a proper retirement income plan for yourself
- you have a succession plan in place for your business
- you don't outlive your money
- you maximize your cash flow
- you utilize assets in the most efficient manner
- your wealth is preserved and protected
- you create a living and lasting legacy that will live on with your kids and community
- your wishes are properly documented 

