Business Owners

Meet David:

David is 52 and owns a successful construction company. His personal wealth is tied closely to his business, and while he's built something meaningful, he worries about cash flow, risk, and eventually transitioning the company to the next generation—or selling it outright.

His Challenges:

- Managing cash flow while funding growth and paying himself
- Reducing taxes and maximizing deductions
- Protecting business and personal assets from risk
- Creating a succession plan for retirement and legacy

How We Help:

- Implement tax-efficient strategies and retirement plans
- Build a business emergency fund and improve receivables management
- Put risk management protections in place (insurance, legal structures)
- Develop a clear succession plan, whether family transition or sale

The Result:

This approach helps plan for a business to be used as a tool for both professional and personal wealth. Developing a clear succession plan provides confidence that the business can also provide long-term security and a clear exit plan when the time comes.