

Succession-Retirement

Strategies & Solutions, Inc.



Top 5 reasons Advisors refer and Clients engage SRSSI

1. Business Owner wants to start developing their 3-10 year **SET** (Succession, Exit and Transition) Plan from their business. Including:
 - a. Retirement Needs analysis
 - b. Business Valuation study
 - c. Strategies to maximize after-tax sale proceeds of business
 - d. Strategies to transfer the business to “insiders” or “outside” buyers
 - e. Contingency planning for the business and family
 - f. Minimizing the taxes and timing of the transfer
 - g. Family Wealth planning
2. Business Owner wants to establish or review their Buy-Sell Arrangement provisions (including valuation methods and triggering events)
3. Business Owner wants to develop a program to selectively Reward, Motivate & Retain Key Employees (beyond their 401k and profit sharing plan)
4. Business Owner wants to establish or improve their corporate Retirement Plan (401k, Profit Sharing, Defined Benefit, 412i, etc.)
5. Business Owner wants to review their personal or corporate life insurance, disability insurance and long term care insurance programs to make sure they are efficient and up to date.

SRSSI. Suitable Strategies. Well Executed.

Experience:

14 years Financial Services Industry
10 years Entrepreneur outside Financial Services Industry
6 years Succession, Exit & Transition (**SET**) Planning

Mark Kandarian • (866) 99-SRSSI Ext. 83
MKandarian@SuccessionRetirement.com
Newport Beach, California