



EXIT PLANNING

Exit planning should be a multiyear process – not a two-day event, and to ensure a smooth, successful transition you must be proactive, not reactive.

WHAT ARE YOUR OPTIONS?

- › Third-party sale
- › Transition within the family
- › Management buyout
- › Selling to employees using an ESOP
- › Liquidation
(when this is the only viable route)

You need experienced advisors who can analyze your specific situation to determine which option is best for you while weighing the tax consequences of each and how it fits into your long-term goals.

Our teams of CPAs at Davis & Hodgdon and wealth advisors at *Copper Leaf Financial are involved in the sale of several businesses every year including more than 25 over the past 5 years. We understand the importance of proactive tax strategizing and how it fits into your decision, and we do the heavy lifting by working closely with business valuation experts, consultants, and attorneys to ensure a smooth transition.

*Copper Leaf Financial is an affiliated and separately registered entity.

WE CAN HELP YOU

- › Articulate and align your personal, business, and financial goals
- › Maximize your business value
- › Identify and capitalize on timing opportunities
- › Resolve key issues by using wise guidance and solutions
- › Financial planning services through Copper Leaf Financial to develop a customized personal financial and “life after business” plans.

WHY PLAN NOW?

- › Control how and when you exit
- › Maximize the value of your business
- › Allow for proactive tax strategizing and keep more of what you get rather than paying too much in state and federal tax!
- › Have strategic options to choose from
- › Enhance peace of mind by knowing your future is secure

Do something
wise today.

Call us for a free consultation
802.878.1963 (Williston)
or 802.775.7132 (Rutland).


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