

HIGH-NET-WORTH SERVICES



# Business Exit Solutions

*Scale or sell with the right team to guide you.*



# Prepare for What's Next

You are an expert on your business, and we can provide the expertise to help you scale or sell it.

The business exit solutions process is complex, and your advisor is strategically positioned to support you throughout the process to help pursue the optimal outcome you deserve.

Your LPL advisor and the team of professionals at LPL Financial High-Net-Worth Services provide business owners with a curated and fully supported experience, providing guidance through the process of selling your business or raising capital. Based on your specific industry and goals, we leverage our network to make impactful connections on your behalf to work towards the highest potential outcome.

## Key benefits:

- Ensure that your desired financial future is at the center of the engagement
- Get a seamless referral pathway to trusted investment banking partners to help with a recap, raise, or sale of your business
- Save time and avoid false starts or confusion as professionals guide the process

## What's included in a business exit plan?

- Reviewing the state of your business
- Preparing for contingencies
- Estimating business value
- Aligning the business plan with your personal goals
- Optimizing goals-based tax and estate planning
- Ongoing wealth management

# Start Planning Your Pathway to Your Future

Three reasons you need a formal business exit strategy

1

## Maximizing Value

By planning ahead, you can ensure that your business is strategically optimized to attract potential buyers or successors, potentially leading to a higher sale price.

2

## Smooth Transition

A thoughtful exit strategy ensures a smooth transition of ownership. This is crucial for maintaining business continuity and minimizing disruptions. It helps in transferring knowledge, retaining key employees, and ensuring that clients and customers remain confident in the business's stability.

3

## Financial Clarity

Your business may represent a significant portion of your personal wealth. An exit strategy can help preserve your financial future by providing a clear plan for monetizing your investment in the business. This includes strategies for retirement, estate planning, and wealth management.

69%

Although there are 33 million small- to medium-sized businesses in the US today, 69% of small business owners have not crafted a formal exit strategy.<sup>1</sup>

1. US Today, "Small business statistics in 2024" June 18, 2024, [usatoday.com/money/blueprint/business/business-formation/small-business-statistics/](https://usatoday.com/money/blueprint/business/business-formation/small-business-statistics/)

## Fill in the blank.

Five important questions to answer when you consider the future of your business:

1. What will happen to your business when you retire?

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2. Do you have a business successor lined up and ready to take over?

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3. Will your entire business or a share of your business need to be sold?

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4. Do you already have a buyer?

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5. Are you looking to raise capital for your business?

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## Start planning today.

Contact your advisor to help guide you through putting a plan in place that aligns with your vision of the future.

This material has been prepared by LPL Financial, LLC.

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