

For Business Owners

Make it a point to build a family business that runs *without you...*

(and beats the transition statistics)



ValuePoints™

A FAMILY BUSINESS OPERATING SYSTEM

BUILD VALUE.
UNLOCK WEALTH.
NEXT CHAPTER.

This workshop is for family business owners:

- with revenue of **\$5 to \$100 million**
- looking to take the business to **next level**
- dealing with **family issues** within the company
- growing the **next generation of leaders**
- seeking **personal financial certainty**
- **managing the risk** the 5Ds can bring
- ready to **design their next chapter**

WORKSHOP TAKE-AWAYS:

- **ValuePoints Workbook** featuring a real story that illustrates the steps, investment and results this operating system can have when implemented fully and consistently
- **ValueBuilder Assessment & Dashboard** is a visual picture of the company's current business value strengths and weaknesses
- **ValueBuilder Report** will walk through a 28-page deep dive into your assessment results and outline what actions to take next
- **Transition Satisfaction Predictor** is an insightful online questionnaire that helps identify what life experiences owners covet most so they can create the freedom and funds to enjoy them
- **FREE COPY of The Master Plan** by Peter G. Christman

LET'S START WITH SOME QUESTIONS...

- ...Which kind of business have you built - Lifestyle or Enterprise?
- ...Is your business running on all cylinders?
- ...Is your team on the same page?
- ...Is your eventual succession plan clearly defined?
- ...Do you have the freedom you dreamed of when you started the business?
- ...If life threw you a 5D curve ball tomorrow, could the business run without you for a month or more?
- ...Will you have any other choice besides liquidation to get money out of the business someday?

If you are not executing a plan designed to build value now, you will not be able to harvest income today, maximize wealth locked inside the business tomorrow or be in control your next chapter.

WHY DO YOUR ANSWERS MATTER? CONSIDER THIS...

In 2016, **74% of family businesses** were employing next-gen family members.*

Yet of those surveyed, even with family working in the business, **only 23% had a formal succession plan in place.***

50% of family businesses will not transition on their own terms due to at least one of the 5Ds: Death, Divorce, Distress, Disagreement and Disability.**

That's where the ValuePoints Operating System comes in. Our experienced team will take attendees through a real-life story about a family business who used the ValuePoints program to weather internal and external challenges - **and thrive** - in spite of it all.

For more details, check out the other side of this flyer. Feel free to contact us with questions or to reserve your seat. Multiple partners and spouses welcome.

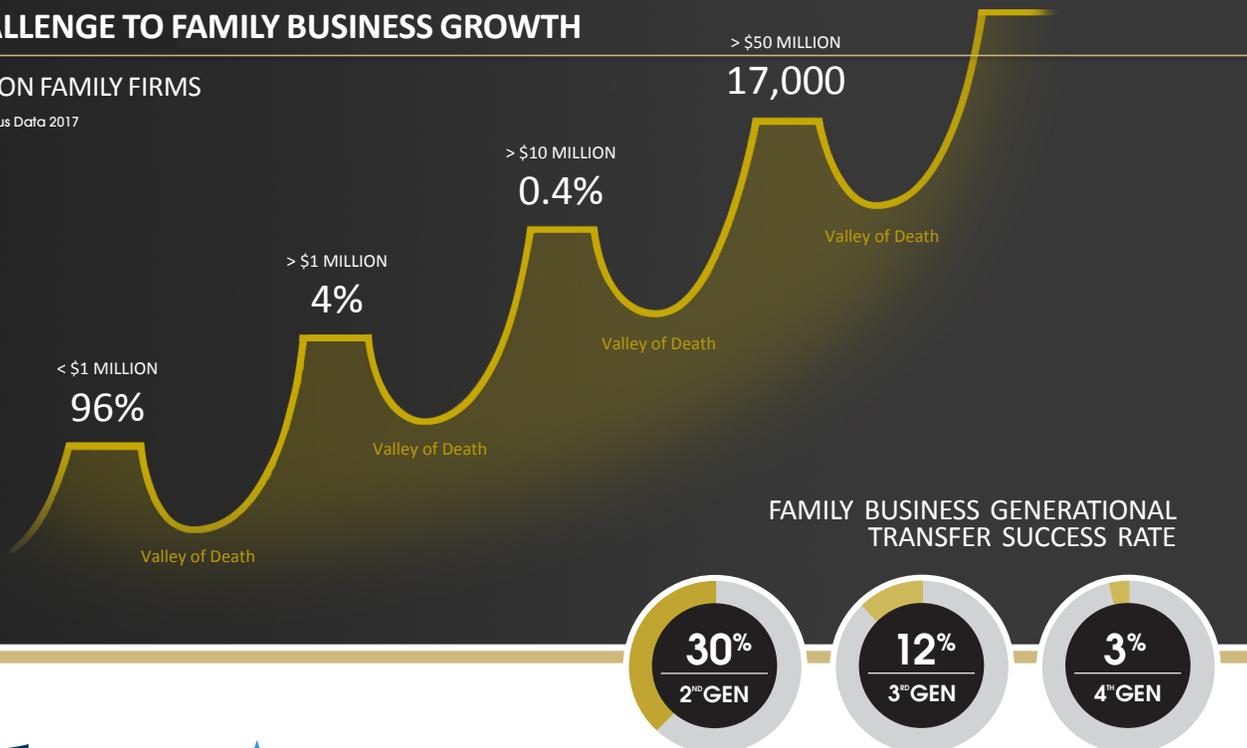
REGISTER TODAY!

CLICK HERE for dates, details & tickets or visit compasspt.com

THE CHALLENGE TO FAMILY BUSINESS GROWTH

25.2 MILLION FAMILY FIRMS

Source: U.S. Census Data 2017



Source: Family Business Alliance 2014



BUILD VALUE

- Strategic Plan | Scaling Up
- Value Acceleration | Value Builder
- Leadership Team Development
- Succession Planning
- Family Business Governance

UNLOCK WEALTH

- Financial Modeling
- Tax Buckets
- Lifestyle Expectations
- Harvest Income from the Business Now
- Manage Risk

NEXT CHAPTER

- Prepare for the 5Ds
- Define Your Vision
- Transition To vs Leaving From
- Three Hurdles
- What's Your Runway

WHAT IS VALUEPOINTS?

ValuePoints is the blueprint every family business needs to build value, unlock wealth and design the next chapter. This workshop is a great opportunity to better understand the impact of investing and implementing a long-term growth & succession plan. The ValuePoints Program is a renewable, year-long engagement presented by Compass Point Consulting & Legacy Planning Partners.

ValuePoints delivers a scalable operating system with coaching support to family-owned businesses with revenue of \$5 - \$100 million that helps organizations drive today's growth and tomorrow's legacy. It's ideal for the owner(s) who:

- Believes there is more growth potential and is looking for ways to unlock it
- Dreams of a business that runs without them, giving them the freedom to spend time with family and on other pursuits
- Wonders about the financial certainty of their personal estate to support and protect the family long-term
- Needs to achieve family unity in a structured way around the business
- Wants the ability to define their future role beyond that of CEO

HOW BUSINESS VALUE IMPACTS THE OWNER:

- Less business value means less **personal net worth**.
- Maximizing business value creates the **opportunity for more money** in your pocket, not only today, but in the future.
- Driving value as part of the company's daily method of operation means YOU are **in control of your options**.
- It means you don't have to "time" your transition, because your **business is always ready for transfer**. And more importantly, it is ready when you are.

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