



BUSINESS PLANNING



Vision

We are a collaborative network that is dedicated to serving the business owner community and their employees.



Mission

To be a trusted resource to small to medium sized businesses that creates value, identifies opportunity, and ultimately helps ownership find balance in life.

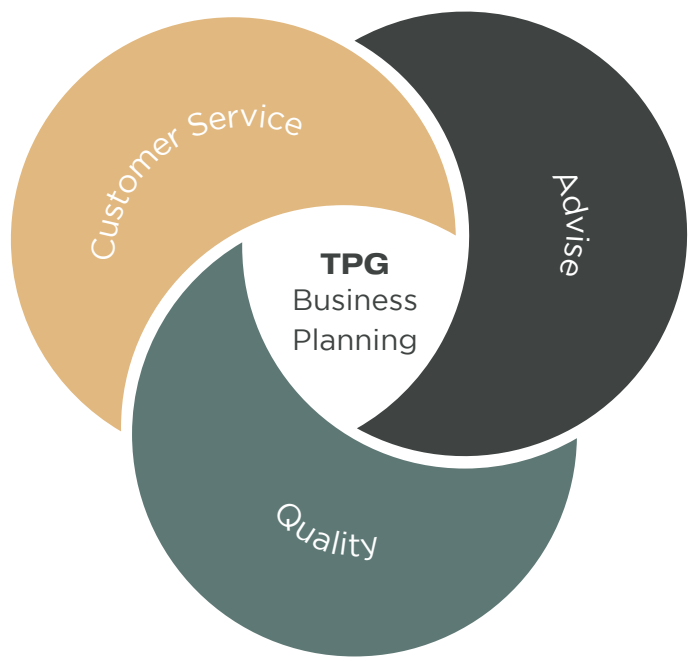


Purpose

We help owners identify, grow, and extract value from the companies they lead without disrupting the long-term viability of success for the organization and its employees.

COORDINATING SUCCESS

What does it look like with TPG Business Planning?



OUR PROVEN PROCESS



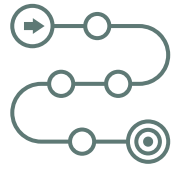
CREATING MOMENTUM

Milestone Reporting to Help Build Successful Outcomes



Business Evaluation

Using one of our evaluation tools we will prepare a report that estimates current value and potential value gaps for your company



Continuity Roadmap

Leave delegates with clear steps that address management and financial responsibilities, employee and client notification, etc.



Financial Plan

Clear vision of financial success for your family today and in the future through a comprehensive financial plan



Action Summary

Summary of action steps to be taken in the business and personally that will provide a report card for our ongoing work

SCOPE OF SERVICES

BUSINESS

- ✓ CONTINUITY PLAN
- ✓ SUCCESSION PLAN
- ✓ 401(K)
- ✓ VALUE OPTIMIZATION

OWNERSHIP

- ✓ FINANCIAL PLANNING
- ✓ INSURANCE STRATEGIES
- ✓ WEALTH MANAGEMENT
- ✓ ADVISOR COORDINATION

EMPLOYEES

- ✓ FINANCIAL WELLNESS
- ✓ FOUNDATIONAL PLANNING
- ✓ BENEFIT PROGRAMS

KEY PLAYERS

- ✓ RETENTION PROGRAMS
- ✓ FINANCIAL PLANNING
- ✓ OWNERSHIP ASSESSMENTS