

***“Integrating a Successful Business Exit with the Significance of Charitable Giving”***

Closely held businesses represent over half of the net worth of the U.S. and many allocate more than twice the percentage of profits to charity their larger corporate counterparts. As an entrepreneurial business owner, much of their personal net worth is in highly appreciated, closely held business interests.

Furthermore, many of these owners are baby boomers who are at, or near, retirement age, and looking for a life of significance after leaving their company. Learn how to help these individuals take charge of their planning in a way that will allow them to transition into a legacy beyond the business, but still as a lifelong leader.