



## **Comprehensive Succession Plan**

- ★ Encourages control and eliminates uncertainty
- ★ Creates multigenerational wealth
- ★ Promotes lasting rewards from your work
- ★ Allows peace of mind
- ★ Ensures a lasting legacy

### **Estate Planning**

- ★ Minimizes estate tax and transfer obligations
- ★ Provides for spousal support
- ★ Addresses contingency concerns

### **Retirement Option Design**

- ★ Promotes preparedness
- ★ Ensures a healthy long-term standard of living
- ★ Allows retirement without jeopardizing business stability

### **Wealth Creation / Capital Management**

- ★ Diversifies financial base
- ★ Reinforces sound money management
- ★ Ensures financial fortitude

### **Ownership Transfer / Leadership Development System**

- ★ Establishes leadership curriculum
- ★ Matches skill development with business needs
- ★ Develops a 'bench' of successor candidates

### **Sustainable Business Model**

- ★ Brings your vision to life
- ★ Specifies goals and action plans
- ★ Maximizes income, equity appreciation, and personal satisfaction



**Legacy by Design, LLC**

901 Bruce Road, Suite 160

Chico, CA 95928

(530) 345-7411

[Kevin@Legacy-by-Design.com](mailto:Kevin@Legacy-by-Design.com)

[www.Legacy-by-Design.com](http://www.Legacy-by-Design.com)