

The Selling Successfully Podcast

EPISODE: 02

Financial Planning: The
Key to a Seller's Sanity +
Success



Top 5 Takeaways



Start planning yesterday

One of the main reasons for failed transitions is the lack of time invested in planning ahead.



Get real about retirement

Determine how much money you need in order to retire and maintain your existing lifestyle.



Understand business is personal

Owners have 80%+ of their wealth tied up in their business. A careful + comprehensive financial plan is required to get your money out tax efficiently.



Strategize for seamless succession

Have conversations early on and plan to minimize tax, improve financial stability of the business and maintain family harmony.



Teamwork makes the dream work

Your M&A expert and financial advisor work together to ensure you're supported from start to sale and beyond.