Portage
M&A ADVISORY

The Selling Successfully Podcast

EPISODE: 07

Smart Exit: The Power of Wealth Management

Top 5 Takeaways

Think big picture

Create a plan you won't outlive. Take comfort in financial preparedness for quality retirement with savvy tax, legacy and estate planning.

Start small, start early

Plan and invest before the big cheque rolls in to create good habits and a solid valuation for a successful exit down the road.

Cut the cookie-cutter approach

A customized plan provides peace of mind that nothing is missed and ensures your strategy reflects your unique needs, personally and professionally.

Tap into top tools

RBC's myGPS is a seamless foundational tool that guides business owners from startup, through operational growth, to succession and exit planning.

Get all access

Investment advisors should have access to a wide range of experts to better meet your needs: commercial account managers, business and cross-border planning specialists, private bankers, etc.