Entity Formation Process

Discover

- Business owner – financial and other goals
- Family – financial dependents, business involvement, future plans
- Team – employees, contractors, board of directors, vendors
- Advisors – Financial Advisor, CPA, Insurance Agent, Banker, Other
- Business – valuation, history, prospects

Plan

- Tax reduction strategies
- Cash flow planning
- Management provisions
- Ownership provisions
- Employee Agreements
- Related entity agreements
- Legal entity planning

Implement

- Sign agreements
- Communicate to appropriate persons
- Involve advisors
- Update Financial Plan

Monitor

Systems in place to renew Discovery, Planning, and Implementation due to:

- New assets
- New risks
- New business opportunities
- Deaths
- Divorce
- Relationship changes
- Other

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