



We'll get you there.

CPAs | CONSULTANTS | WEALTH ADVISORS

Can Your Business Run Without You?

Presenters: Heather Parbst and Marcus Bowman



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How Long Could Your Business Run at a High Level of Performance Without You?

- I don't think they'd make it an hour
- Less than a week
- One to four weeks
- I could be away for a month or more
- They've got this! My only job is to stay out of the way!

How Does Owner Transition Pertain to Decentralizing the Business Owner?



Learning Objectives

How your approach to business management may be holding you back

To identify areas where your business may be too dependent on you

Strategies aimed at increasing the sustainability of your business and your personal freedom.



Is Your Approach Holding Your Company Back?

Increases risk

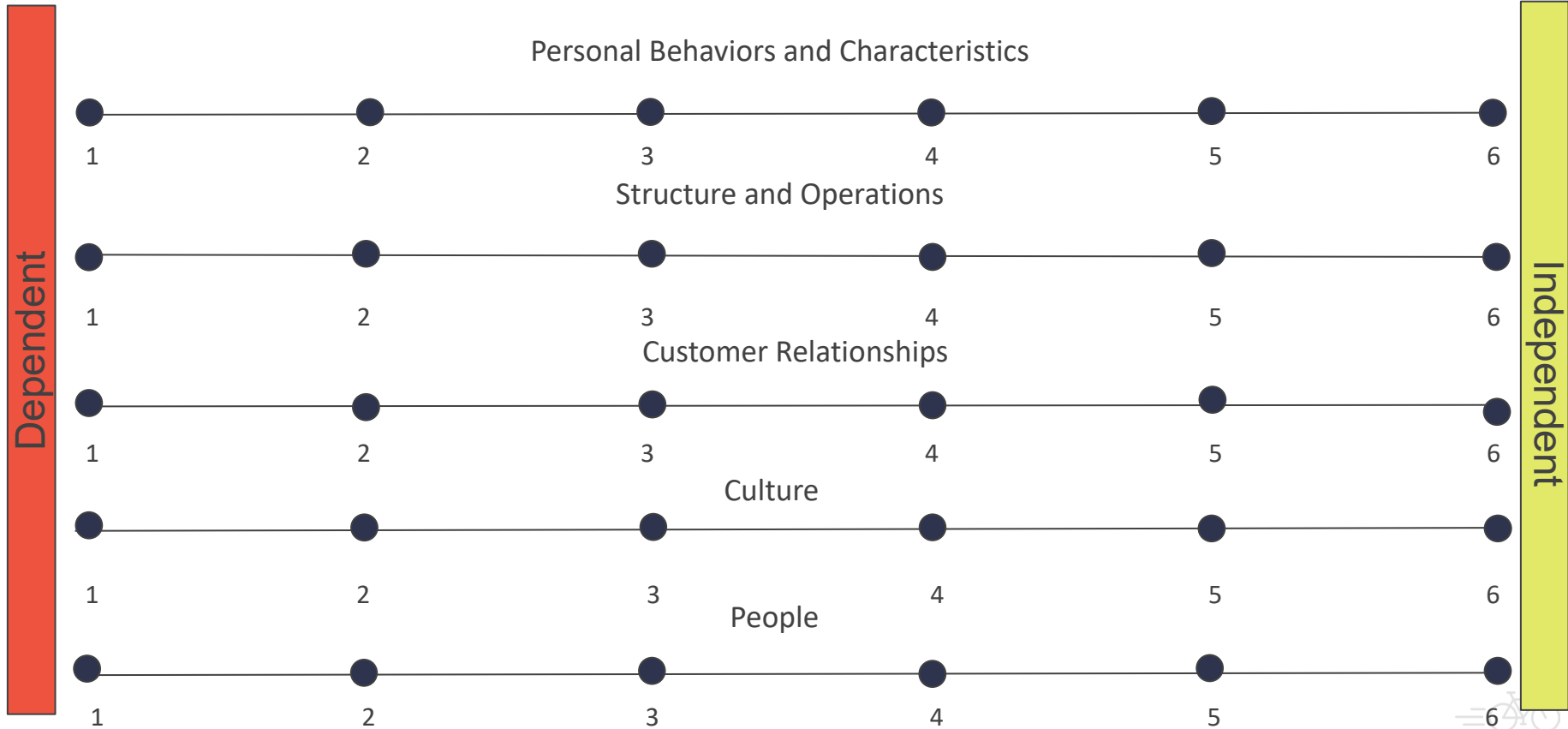
Reduces value

Creates bottlenecks

Limits your team



How Decentralized am I From My Business?



What are Some Strategies to Reduce Dependence?

Personal

Structure and
Operations

Customer
Relationships

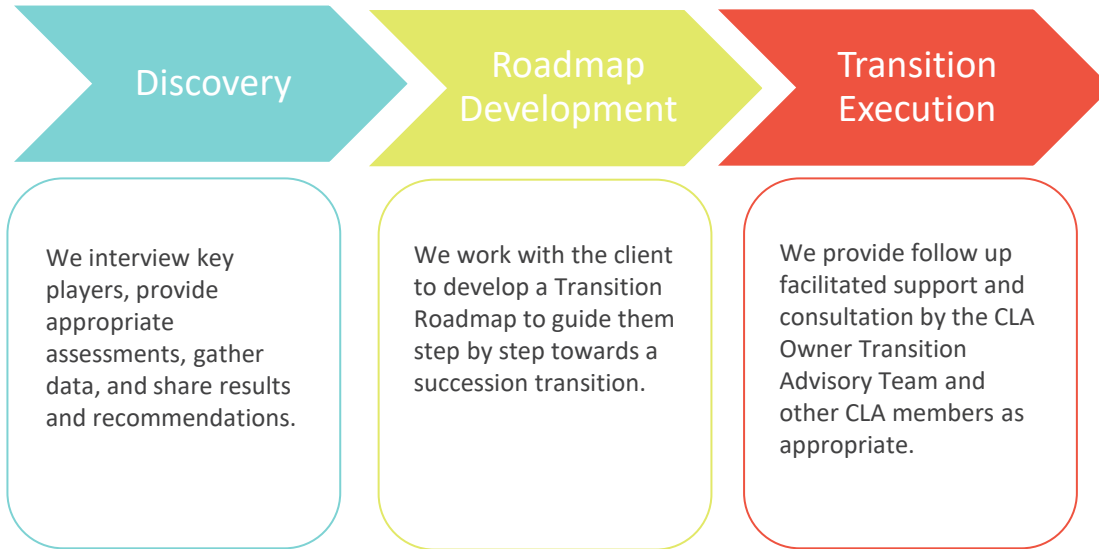
Culture

People



Our Approach

- Certified Exit Planning Advisors (CEPAs) who take a holistic approach to transition.
- We assess for readiness across three areas: **personal, financial, business**
- Our goal for the transition:
 - To be a celebration
 - To meet the goals of the owner(s)
 - Maximizes value
 - Leave behind a sustainable, healthy, organization.



Readiness for Transition

Transitioning your business can be a complicated and emotionally charged process. CLA helps you turn what may be the biggest transaction of your life into the celebration you have been working for.

Owner Transition Services

- **Owner Transition Advisory**
- **Wealth Advisory**
- **Tax Planning**
- **Quality of Earnings**
- **Calculation of Value**
- **Estate Planning**
- **Investment Banking**
- **Talent Solutions**
- **Succession Planning**
- **Family Business**

CLA's OTA Advisors act as the "quarterback," connecting our clients with the services they need.



Questions?



THANK YOU!

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