

Take Control on the **Succession** Highway

CLA has the experience, people, and passion to help you, your family, and your business every step of the way. Our commitment to helping you reach your destination is strong — that's the **CLA Promise!**

CLAconnect.com

WEALTH ADVISORY | OUTSOURCING AUDIT, TAX, AND CONSULTING

Merger and acquisition, wealth management, and investment planning services are offered through CliftonLarsonAllen Wealth Advisors, LLC. member FINRA and SIPC.



Discover Value

Where can you find and grow (or preserve) value in your business? What drives value in your industry? Do you know the risks?

Evaluate Options

Work with an investment banking advisor or business broker to identify and evaluate potential counterparties to your plan (outside buyers, family members, management, ESOP).

Make It Happen

Confirm financing options, connect with possible investors, and learn the tax implications and opportunities.

Preserve Wealth

Execute the plan, manage your risks, transition your estate, invest with purpose, and get on with what's next in life.

Keep driving! **Enjoy life!**

