

#3 FINANCIAL PLANNING

Financial Planning
Before & After
Selling a Business

A PLAN THAT PROTECTS WHAT YOU'VE BUILT
AND PREPARES YOU FOR WHAT'S NEXT.

Selling your business is one of the most significant financial
events of your life. The right plan—before and after the sale—
can help you maximize value, minimize taxes, and create
lasting freedom for you and your family.

BEFORE
THE SALE
PREPARE

AFTER
THE SALE
PROSPER

BEFORE THE SALE: PREPARE



DEFINE YOUR GOALS

Clarify what you want from the sale—financial freedom,
legacy, lifestyle, or all three.



MAXIMIZE BUSINESS VALUE

Improve profitability, streamline operations, and position
your business for the strongest exit possible.



TAX-EFFICIENT STRUCTURING

Explore entity structure, timing, and strategies to minimize
taxes and keep more of what you've earned.



PERSONAL FINANCIAL READINESS

Align your personal balance sheet, cash flow, and liquidity
to handle a successful transition.



EXIT STRATEGY & NEGOTIATION SUPPORT

Work with trusted advisors to create options, evaluate offers,
and negotiate terms that align with your goals.



ESTATE & LEGACY PLANNING

Ensure your plan supports your family, business succession
objectives, and philanthropic goals.

AFTER THE SALE: PROSPER



CAPITAL ALLOCATION STRATEGY

Develop a diversified investment plan aligned with your
risk tolerance, goals, and time horizon.



TAX PLANNING & CASH FLOW STRATEGY

Implement strategies to manage your tax bill and create
sustainable income for the future.



RISK MANAGEMENT

Protect your wealth with insurance solutions and a
comprehensive risk management plan.



LIFESTYLE & PURPOSE PLANNING

Design the life you want next—travel, passions, family,
or new ventures.



PHILANTHROPY & IMPACT

Align your wealth with your values and create a legacy
that extends beyond you.



LONG-TERM LEGACY PLAN

Build a multi-generational plan to preserve wealth and
prepare the next generation.



With the right financial plan before and after the sale, you can move forward with
confidence—protect your wealth, reduce taxes, and create the life and legacy you've earned.

WHY BUSINESS OWNERS CHOOSE WIN



FIDUCIARY BY DESIGN

As a fee-only, SEC-registered
RIA, we always put your
best interests first.



BOUTIQUE RELATIONSHIP

High-touch service and
direct access to senior
advisors who know
your goals.



HUMAN-LED. AI-EMPOWERED.

Technology and data
enhance decision-making—
without replacing judgment
or relationships.



THE WIN NETWORK

We coordinate across a
curated network of professionals
to ensure every piece
works together.



ALIGNMENT

Your success is our priority.
We succeed when you do.



FOUNDER & WEALTH ADVISOR

Leads the relationship with overall
stewardship of your financial life.
Sets the vision, strategy, and
long-term plan while ensuring a
fiduciary standard in every decision.



CO-ADVISOR

Partners with you on investment
strategy, portfolio construction,
and ongoing guidance. Provides
additional perspective and
seasoned experience.



CERTIFIED FINANCIAL PLANNER™

Leads the financial planning
process—cash flow, tax strategy,
retirement, estate coordination,
risk management, and
goal achievement.



CLIENT SERVICE DIRECTOR

Your central point of contact who
ensures a seamless experience,
coordinates the team, and keeps
everything organized and
moving forward.

Together with our specialized network of professionals, we provide comprehensive, coordinated guidance
so you can make confident decisions and focus on what matters most.

Let's Navigate Your Next Chapter—Together.

Schedule a complimentary, no-obligation strategy session to discuss your goals and
explore how WIN can help you protect what you've built and create what's next.

SCHEDULE YOUR PRIVATE CONSULTATION



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winwealthadvisors.com

