



FACILITATION SERVICES

IMPROVING THE BUSINESS OWNER EXPERIENCE

Facilitation is a professional process to successfully guide you from Point A to Point B by coaching you in how to have the right conversation with the right people at the right time.

Our goal is to help you:

- Explore your options and possibilities;
- Design processes that work for you; and
- Define and acquire needed resources to craft the best solution for you.

We facilitate two types of important conversations that have a direct connection to your most valuable asset – your business:

- Management Buy Outs
- Shareholder Buy Sell Agreements

Both of these conversations are among the most important you will have about wealth and financial risk management. Too often (in most of the cases we have reviewed), these conversations have either not happened or are woefully incomplete. Inadequate process and expectations explain the poor results. A facilitated process can be the antidote.

To learn more about our facilitated processes for Management Buy Outs and Shareholder Buy Sell Agreements, please refer to the individual descriptions on our website.