



WHO WE ARE

OVERVIEW

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TrustDesign is a private wealth-planning firm for the entrepreneur. Over the years, our services have evolved and narrowed; we now provide a unique set of services tailored to the needs of the business owner and his or her family. These include:

- Exit Planning Services – Coaching Owners to their Biggest Payday
- Facilitation Services for Buy Sell Agreements and Management Buy Outs
- Traditional Wealth Planning, including estate planning and financial advisory services as well as implementation and funding solutions such as Life Insurance, Long-term Care Insurance, Annuities, and Investment Management

A RESOURCE TO HELP YOU MANAGE THE COMPLEXITIES OF WEALTH

Wealth planning is complex. When a privately-held business is added to the mix, the complexity soars. To manage the complexity, there is no substitute for an advisory team who is both experienced and plays well with each other. We excel as a team player in these complex situations. We have deep experience working with the finest and most committed professionals in the greater Boston community, including a variety of attorneys in various specialties, CPAs, Valuation Experts, Management Consultants, CFOs, Organizational Consultants, Family Offices, Philanthropic Consultants, Executive Coaches, and Boards of Advisors.



DANIEL A. GUGLIELMO | JD

BUSINESS-OWNER ADVOCATE | TRUSTDESIGN

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Dan Guglielmo is a nationally recognized business-owner advisor, speaker and author. His 20+ years of experience helping business owners to leverage the value of their business to protect family and dreams have established him as a trusted advisor to his clients, their families, and their attorneys, accountants and other advisors. His advocacy of business owners led him to co-found The Owner's Academy based at Babson College and The Boston Exit Planning Exchange (www.XPXBoston.com), which are supported by both business owners and professional advisors across the U.S.

Dan began his professional career at the Securities and Exchange Commission (SEC) as a Finance Attorney. He later became a tax attorney, earning a reputation for his holistic and creative approach to strategic wealth transfer planning. He received a Bachelor of Arts degree from Colorado College, a Juris Doctorate from Arizona State College of Law and studied for his LL.M. in Taxation at Boston University.

IMPLEMENTING SOLUTIONS THAT IMPACT BOTH THE FAMILY AND BUSINESS

Coming from three-generations of business owners, Dan draws upon his insight to help business owners tie their values to the family and business strategic financial plans. Many of these plans include strategies that enable the entrepreneur to tax-efficiently plan for retirement, provide for the family's security, retain key employees, and arrange for a smooth succession of the business.