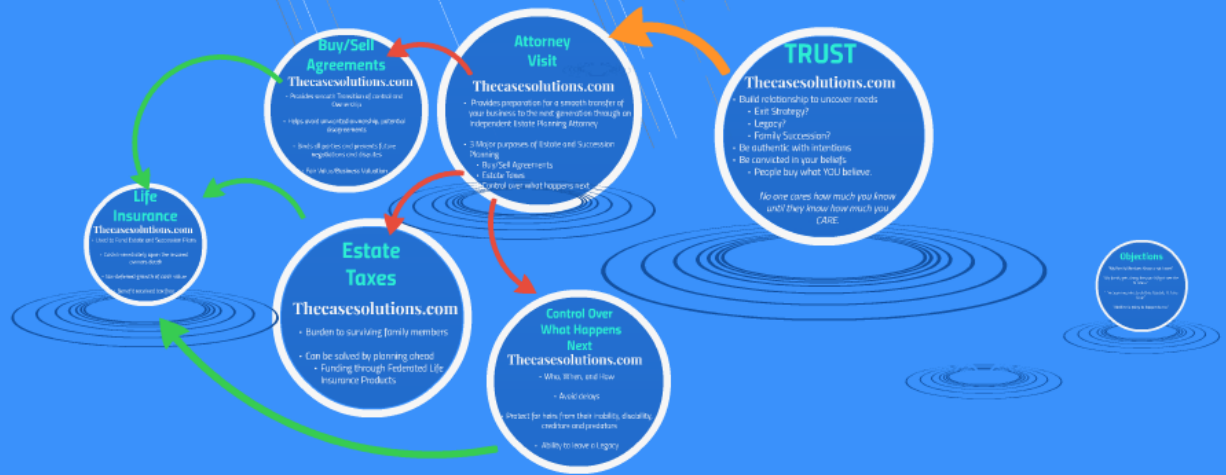


Succession Planning: Surviving the Next Generation

Thecasesolutions.com

Objectives
 Thecasesolutions.com
 • Build relationship to uncover needs
 • Exit Strategy?
 • Legacy?
 • Family Succession?
 • Be authentic with intentions
 • Be convicted in your beliefs
 • People buy what YOU believe

Thank you
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Objectives
Thecasesolutions.com
What are your objectives?
- How do you want to pass on your business?
- How do you want to pass on your assets?
- How do you want to pass on your legacy?

Thank you
The success of your business depends on the success of your succession plan. Thank you for taking the time to learn more about Thecasesolutions.com.



Objections
"I don't have the time to do this."
"I don't have the money to do this."
"I don't have the knowledge to do this."
"I don't have the energy to do this."
"I don't have the support to do this."

Control Over What Happens Next
Thecasesolutions.com
- Who, When, and How
- Avoid delays
- Protect for heirs from their inability, disability, creditors and predators
- Ability to leave a Legacy

Objectives

Thecasesolutions.com

- What is it?
- Trust and the Ripple Effect
- The 3 Key ways Estate and Succession Planning Bring Value
- Life Insurance as a Foundation
- Objections

TRUST

Thecasesolutions.com

- Build relationship to uncover needs
 - Exit Strategy?
 - Legacy?
 - Family Succession?
- Be authentic with intentions
- Be convicted in your beliefs
 - People buy what YOU believe.

*No one cares how much you know
until they know how much you
CARE.*

Attorney Visit

Thecasesolutions.com

- Provides preparation for a smooth transfer of your business to the next generation through an Independent Estate Planning Attorney
- 3 Major purposes of Estate and Succession Planning
 - Buy/Sell Agreements
 - Estate Taxes
 - Control over what happens next

Buy/Sell Agreements

Thecasesolutions.com

- Provides smooth Transition of control and Ownership
- Helps avoid unwanted ownership, potential disagreements
 - Binds all parties and prevents future negotiations and disputes
 - Fair Value/Business Valuation

Estate Taxes

Thecasesolutions.com

- Burden to surviving family members
- Can be solved by planning ahead
 - Funding through Federated Life Insurance Products

Control Over What Happens Next

Thecasesolutions.com

- Who, When, and How
 - Avoid delays
- Protect for heirs from their inability, disability, creditors and predators
- Ability to leave a Legacy



Life

Insurance

Thecasesolutions.com

- Used to Fund Estate and Succession Plans
 - Cash Immediately upon the insured owners death
 - tax-deferred growth of cash value
 - Benefit received tax free
- 