

# Legacy by Design

The Succession Planning Endorsed Provider for:



Committed to Building The Best Business Environment for Northeast Equipment Dealers

“To desire is to obtain;  
to aspire is to achieve...  
Dream lofty dreams, and as you dream,  
so shall you become.”  
- James Allen, circa 1900

## Comprehensive Succession Solutions...

- Retirement Design
- Wealth Creation
- Leadership Development
- Business Plan
- Estate Plan



## Promote Planning to Preserve Tradition.



“Planning for success improves life. **Planning** promotes preparedness, it builds a better business, and it **enhances the satisfaction from your work.**”

- Kevin Spafford in *Farm Journal* November 2006

## Focused on your legacy

✓	What's on your wish list?
	Maximize business – income, equity, and satisfaction
	Improve bottom line and reduce expenses
	Eliminate conflicting ‘remedies’
	Save money, time, and effort
	Protect family and maintain a healthy standard of living
	Exercise options to efficiently achieve objectives
	Enhance retirement
	Add a coach who will monitor your interests
	Secure a second opinion
	Enjoy peace of mind

## How do we get started ?

1. Gather for review all personal, financial, and legal data regarding the owner, the family, and the business.
2. Use interactive tools and counsel to identify the desired ideal, as plans are delineated for ownership transition, wealth accumulation, retirement, and estate planning.
3. Create a foundation of facts, and establish a starting point from which to build.
4. Research for results. Design a “to do” list of activities, establishing roles and responsibilities for each team member.
5. Concurrently perform a second opinion on all financial matters. Most family owned businesses falter due to poor money management.
6. Continuously serve as a resource as the business develops and the plans of succession mature.



Planning for success ~  
a process,  
not an event.

— Kevin Spafford —

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