

## A Financial Plan for Life Beyond Your Business



### How much is really enough?

Would you accept a check for \$5 million for your company? How about \$50 million? Is your business ready to be sold at a moment's notice? Should you not want to sell, do you have a plan in place to equitably split it among your heirs? Will there be enough left for you to retire?

The answer depends on knowing **YOUR** bottom line.

Having a clear picture of your personal finances is just as important as understanding the balance sheet of your business. Only then can you proceed to do what is best for your business, yourself, and your family in terms of succession planning, retirement, and new adventures in life. Knowing your bottom line requires running the numbers with a team that has a deep understanding of the challenges and opportunities associated with privately held businesses. Let us help.

### How we work with you:

- **In-depth analysis of your personal finances**, including all assets and liabilities. We focus on areas of weakness in your insurance coverage, estate plan, tax exposure, cash flow. The end result: a clear view of your current financial picture, and how well-prepared you are for the life you want.
- **Goals assessment and alignment**. We will help you get specific about your goals and aspirations for life beyond your business. We then determine how your finances can support those goals and what you care most about, well into the future.
- **Creation of an estate and legacy plan**, and guidance in sharing this plan with your business partners and professional advisors.
- **Ongoing, comprehensive wealth management**. We provide world-class investment management, integrated with your financial and estate plans, all focused on your goals. Each financial decision you make can then build on the previous ones, allowing you to move forward with confidence.

### Having your own plan is key

You may have a business plan. You may even have a succession plan – although most business owners do not. At Laird Norton Wealth Management, we believe you should have a comprehensive personal financial plan to inform your business planning.

When seeking advisors to help you manage crucial transitions, you should look for experience in working with family businesses, a willingness to help you explore all your options, and a firm that puts the interests of you and your family first.

### Why work with Laird Norton Wealth Management

For more than 50 years, Laird Norton Wealth Management has helped privately held businesses, in many different industries, navigate the unique crossroads of their professional and personal lives. Over time, we have accumulated an exceptional understanding of what factors allow business-owning families to thrive through multiple generations. We were founded to serve as wealth and trust advisors for the Laird and Norton families (now in their seventh generation as successful business owners) and today work with many other entrepreneurial families to preserve and expand their legacies.

**Learn More:** To find out more about Laird Norton Wealth Management's work with business-owning families, please call or email us.

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