

A FINANCIAL PLAN FOR LIFE BEYOND YOUR FAMILY 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?

WHAT ARE THE FINANCIAL NEEDS OF YOUR BUSINESS AND YOUR FAMILY?

Understanding your personal financial needs is as important as understanding the balance sheet of your business. Succession planning, your retirement and the future health of your business and family depend on it.

Have you run the numbers with a team that has a deep understanding of the complex dynamics associated with privately held businesses?

For more than 45 years, Laird Norton Wealth Management has helped owners of privately held businesses, regardless of industry type, who need assistance navigating the unique crossroads of their professional and personal lives. Laird Norton Wealth Management has an exceptional understanding of how to support the needs of multi-generational, business-owning families. We were founded to serve as wealth and trust advisors for the Laird and Norton families (family business owners for seven generations) and now work with numerous entrepreneurial families in the Pacific Northwest to preserve their legacies.

WE INVITE YOU TO WORK WITH US TO PUT A PLAN IN PLACE TODAY.*

OUR PROCESSES –

- A **personal assessment** that reviews your current financial plans, insurance coverage and existing estate documents. We provide an analysis of your financial health and present suggestions for how to strengthen areas of weakness. You'll clearly see your current financial picture and how successful this looks for sustaining your lifestyle into the future.
- A **goals assessment** that addresses hopes and wishes for life after the family business. We will confirm that you and your family's values and goals are both aligned and financially supported.
- The creation of a **legacy plan** and guidance in sharing this strategy with your family, business partners and professional advisors.
- A **long term engagement** for continued wealth management that includes in-depth analysis, financial planning and portfolio monitoring.

You may have a business plan. You may even have a succession plan – although nearly 30 percent of family business owners do not.** At Laird Norton Wealth Management, we believe you should also have a financial plan for your life beyond your family business.

When seeking advisors who can help you prepare for and manage these crucial transitions, you should look for experience in working with family businesses, a willingness to help you explore options, and a firm that puts the interests of you and your family first. A firm like Laird Norton Wealth Management.

* Along with understanding your personal balance sheet, there are two additional assessments that illuminate issues that affect the transition of your family's business and other assets. A business assessment focuses on the key elements that determine the value of your business for a future transition and a family assessment addresses the family's strengths, values challenges and communications. We can help you find experts in these fields.

**Data from Laird Norton Tyee Family Business Survey: Family to Family 2007.