



Plan for Today, Prepare for Tomorrow.

YeoConsults Legacy Program.

Building long-term value in your business takes a clear road map to create a legacy of continuity and success. With **YeoConsults Legacy Program** we'll help you navigate the road to success.

Our Legacy Program paves the way for your company's continuing success and builds a solid foundation to retire, exit, or otherwise transition away from your business when the time is right. Let Yeo & Yeo help improve the financial management of your business, and your personal wealth.

For more information or to request a proposal for our YeoConsults Legacy Program, or other YeoConsults solutions including YeoConsults Outsourced Accounting and YeoConsults Internal Controls, contact David Schaeffer, Principal and Yeo & Yeo's Legacy Program Consultant at 800.968.0010 or any Yeo & Yeo professional.

The comprehensive and flexible approach of our YeoConsults Legacy Program provides you with:

YeoConsults Legacy Annual Business Valuation Report

Recommendations on how you can work to increase overall business value.

Financial & Industry Analysis

Compare actual financial results to prior year results and to those of similar companies in the industry. In-depth discussion and tracking of important metrics and ratios, with recommendations for improvement.

KPIs - Benchmarking & Dashboards

Daily/weekly/monthly dashboards to provide the business owner with up-to-date, accurate, and pertinent information in order to make informed decisions with more accuracy and less time.

Succession / Transition Consulting

In-depth analysis of the personal financial condition, personal plans and goals, and exit strategy of the business owner. Preparation of a personal financial statement, review of estate planning documents, discussion of owners' exit plan, along with goals and objectives in order to attain success.

Quarterly Review of Company Financials

Compare to prior year, budgets, and established benchmarks.

Tax Planning

Year-end tax planning and ideas to reduce tax burden, motivate employees, and provide wealth accumulated for owner.

Communication

Monthly calls/meetings with management to discuss concerns, strategies – or whatever else might be on your mind. Quarterly face-to-face, in-depth meetings with specific topics and agendas to accomplish the above objectives.