PLANCORP™

Your Financial Life Advocate.

Exit Strategy Advisors

The Plancorp Exit Strategy Process

Too often, business owners know they need an exit strategy, but they don't know where or when to start. At Plancorp, we don't limit you to a simple exit plan, but rather work with you to develop a comprehensive strategy to help you determine the best outcome for you and your business.

Our approach centers around one key objective: helping you live the life you want after exiting. We work with you from day one to determine exactly what that vision is—and then map out a strategy to make it a reality.

Discovery

Your exit strategy should be specific to you. We'll start by sitting down with you to determine your unique needs, based on your personal goals.

Data Collection

Next, we'll work with you to complete an assessment and collect pertinent personal and business information. Using this data, we'll create a customized proposal for Exit Strategy services.

Valuation & Analysis

Before you decide to stay or exit, you need to know your options. We'll coordinate a value estimate, conduct a financial independence analysis and prepare a wealth management plan—equipping you with the information you need to make a decision.

Decision

STAY

Implementation

You may need to pause to build more value in order to reach your goals. If that's the case, we'll help you identify and enhance the right value drivers, introducing specialists as the need arises.

EXIT

Implementation

Once you're ready to exit, we'll create a detailed exit plan. Then, we'll assemble and collaborate with an Advisory Team to implement it.

Successful Exit

We'll take implementation through the finish line—your exit. Then, it's time for you to pursue the life goals you outlined during the initial discovery phase. Congratulations!

At Plancorp, advocacy means more than simply outlining a financial plan or asset allocation. It means partnering with our clients, building relationships and infallibly placing their interests ahead of our own.

That's been our philosophy since we opened in 1983, and the sentiment still drives every decision we make. After more than three decades of helping individuals, families and business owners plan for financial independence, our commitment to serving as financial life advocates is stronger than ever. We have no commissions, no hidden fees and no hidden agendas.

In order to partner with you in all aspects of your financial life, Plancorp specializes in four areas of expertise:

» Financial Planning and Wealth Management
» Retirement Plan Advisors
» Exit Strategy Advisors
» Institutional Asset Management

Contact us to learn more about our unique approach or to schedule a complimentary, no-obligation meeting.

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