

Exit and succession planning

Working with you to achieve **clarity**
Private Wealth Management



High-level goals

Determine your high-level exit planning, business and personal goals. Where are you now? What do you wish to achieve over the coming years? What is holding you back?



Value gap analysis

What is the potential future value of the business and what is the value of the business now? We educate on value creation, risk and potential future strategies.



Business attractiveness

Discover how attractive your business is to a potential purchaser. Based on worldwide research, we score your business and establish a benchmark to improve value.



Personal readiness

Are the shareholders of the business ready to exit or transition out of the business? We assess based on personal, financial and emotional factors and discuss strategies.



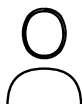
Business readiness

This audit process provides the business with an Exit Planning Readiness score and a pathway to move forward. It includes exit planning strategies and action plans to help ensure a successful transition.



Value creation

Based on your goals, we help further refine and develop your strategic plan and look at value creation strategies. Includes a review of your current financial health and forecasts.



Accountability and implementation

We implement a regular accountability meeting where we manage the exit planning process.

ATX Wealth Partners**UBS Financial Services Inc.**

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