



Chrysalis Wealth Partners

Empowering business owners to navigate with confidence



Navigate with confidence

Uncover
opportunities

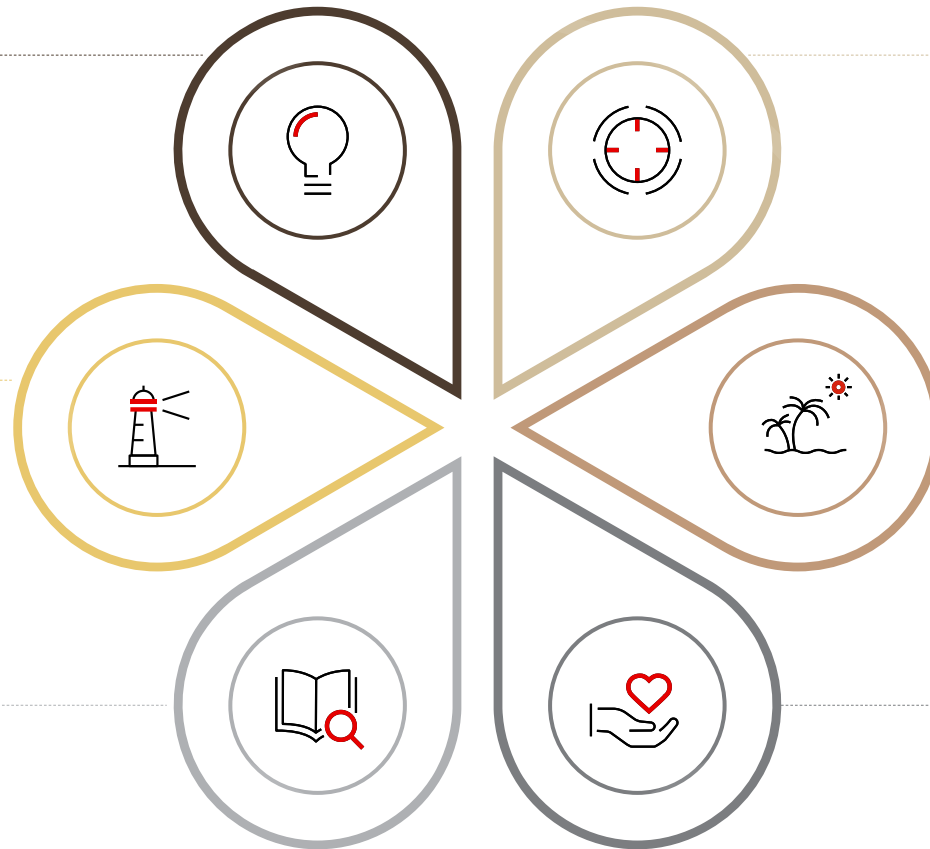
Gain more
financial control

Manage risk
more effectively

Fulfill a work-
optional lifestyle

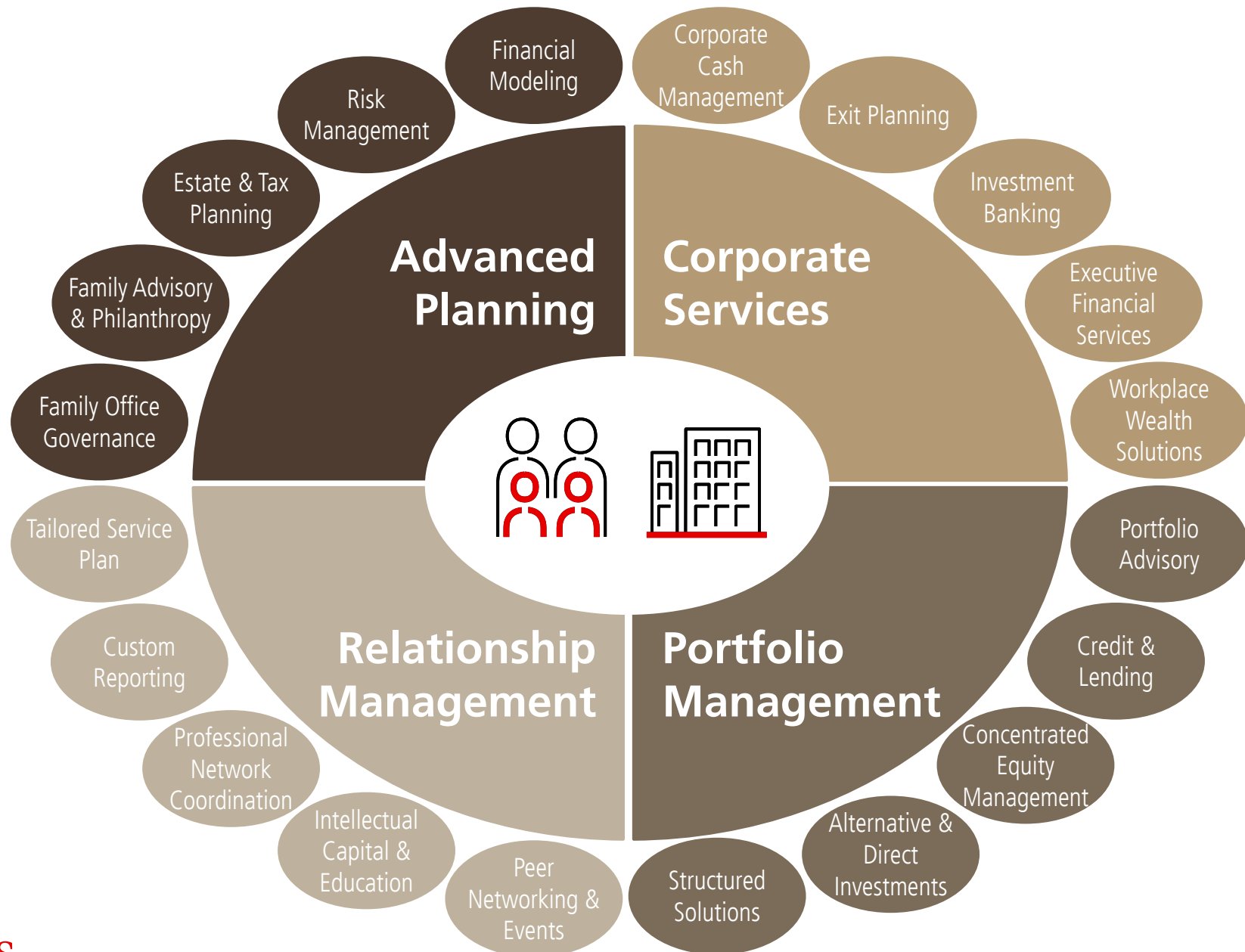
Make more
informed decisions

Strengthen
your legacy

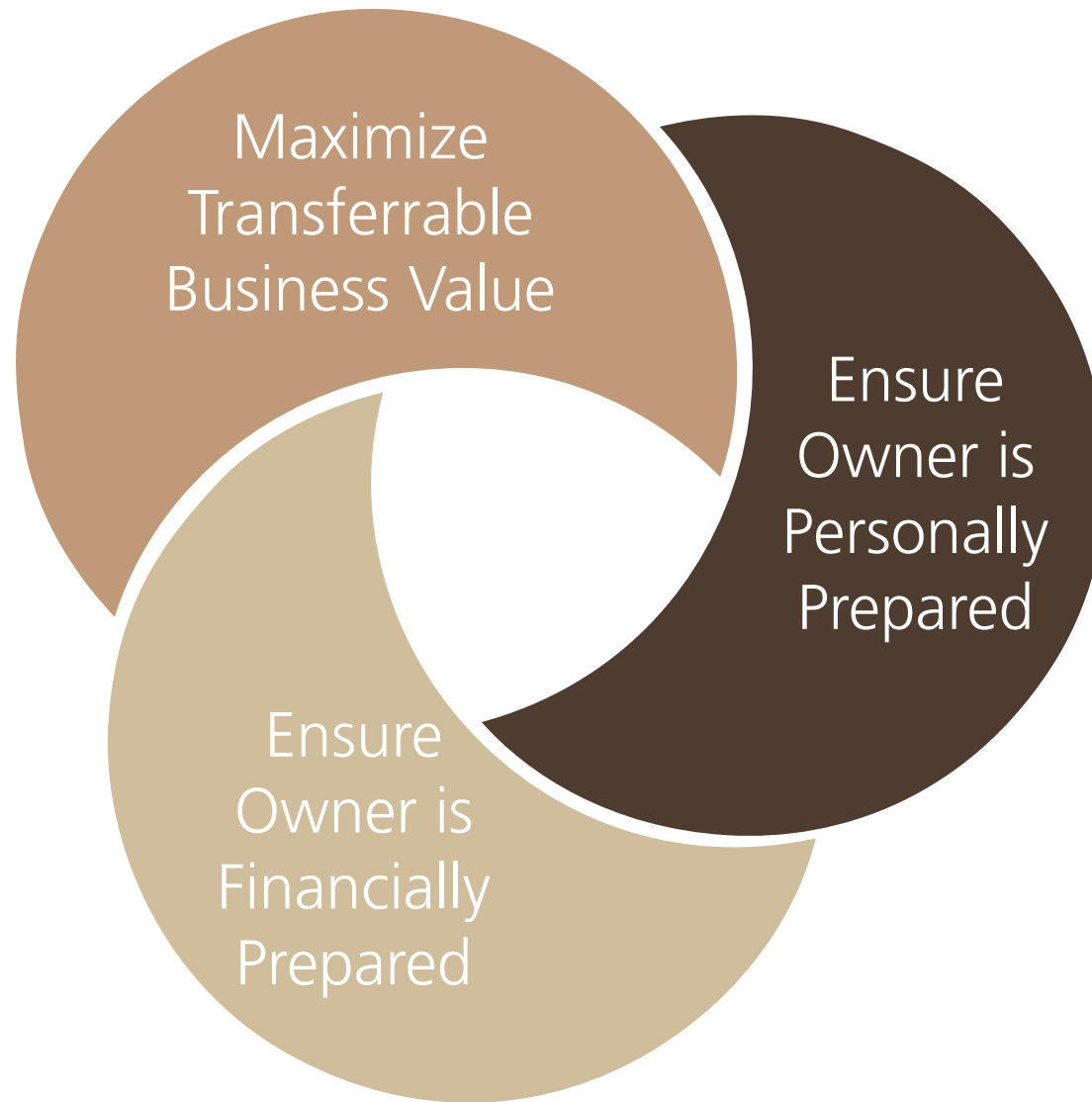


Chrysalis Wealth Partners empowers families and their businesses to navigate financial complexity and uncertainty with confidence

Our wealth management capabilities for business owners

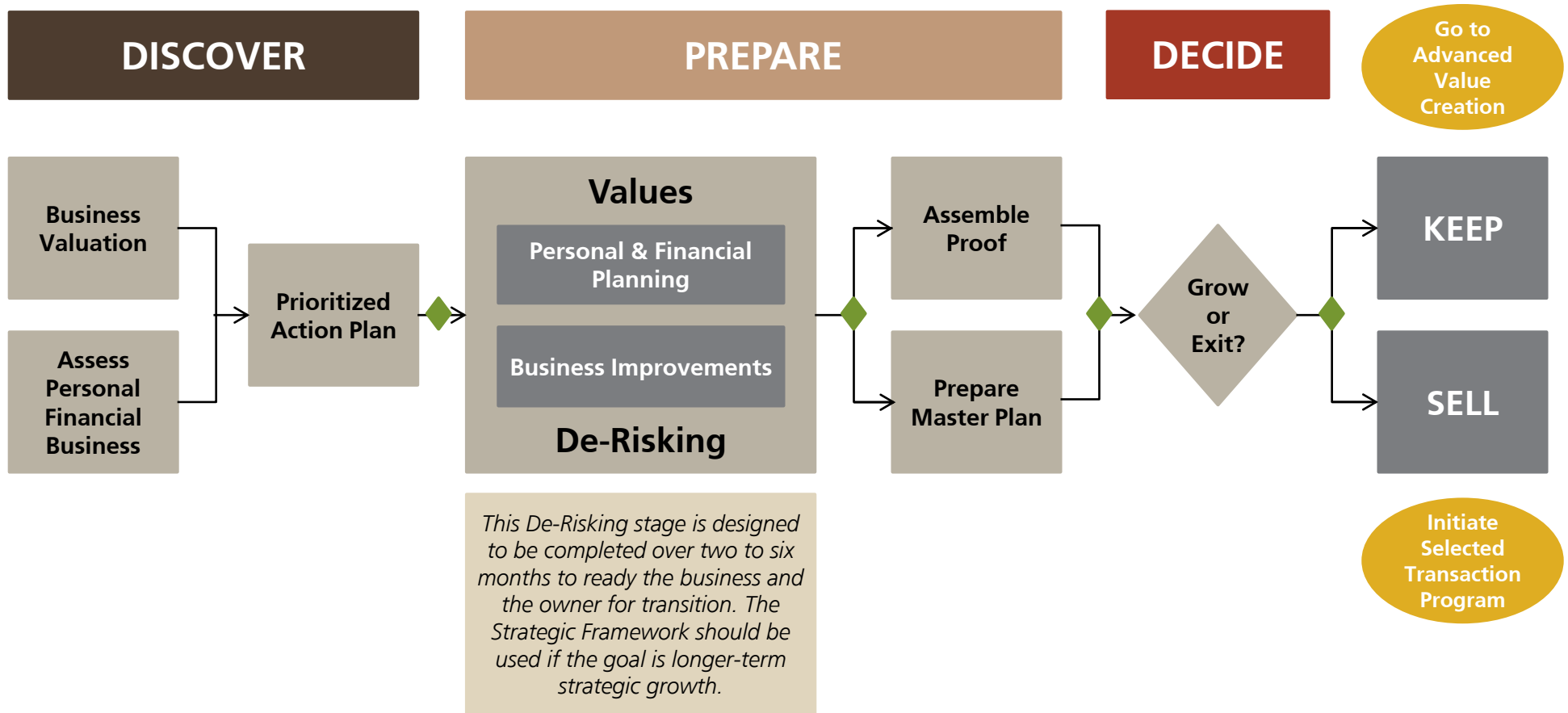


Exit planning – a successful exit strategy



Exit Planning - The CEPA® Value Acceleration Process*

The Value Acceleration Process provides a framework to help business owners with Exit Planning



◆ Key milestone

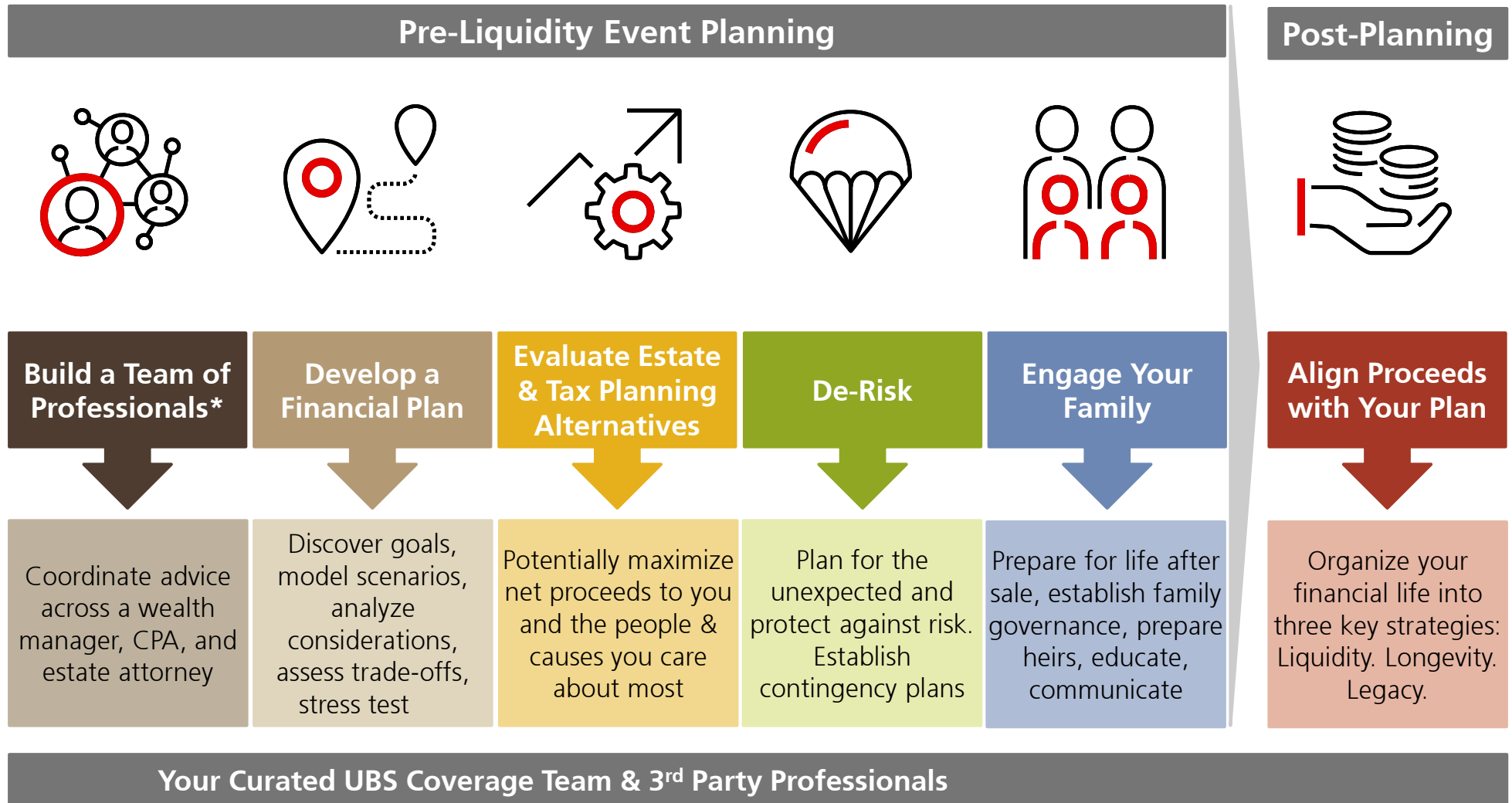


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Our wealth planning process for a liquidity event

Appropriate wealth planning before & after a liquidity event can potentially result in considerable savings. Start early.

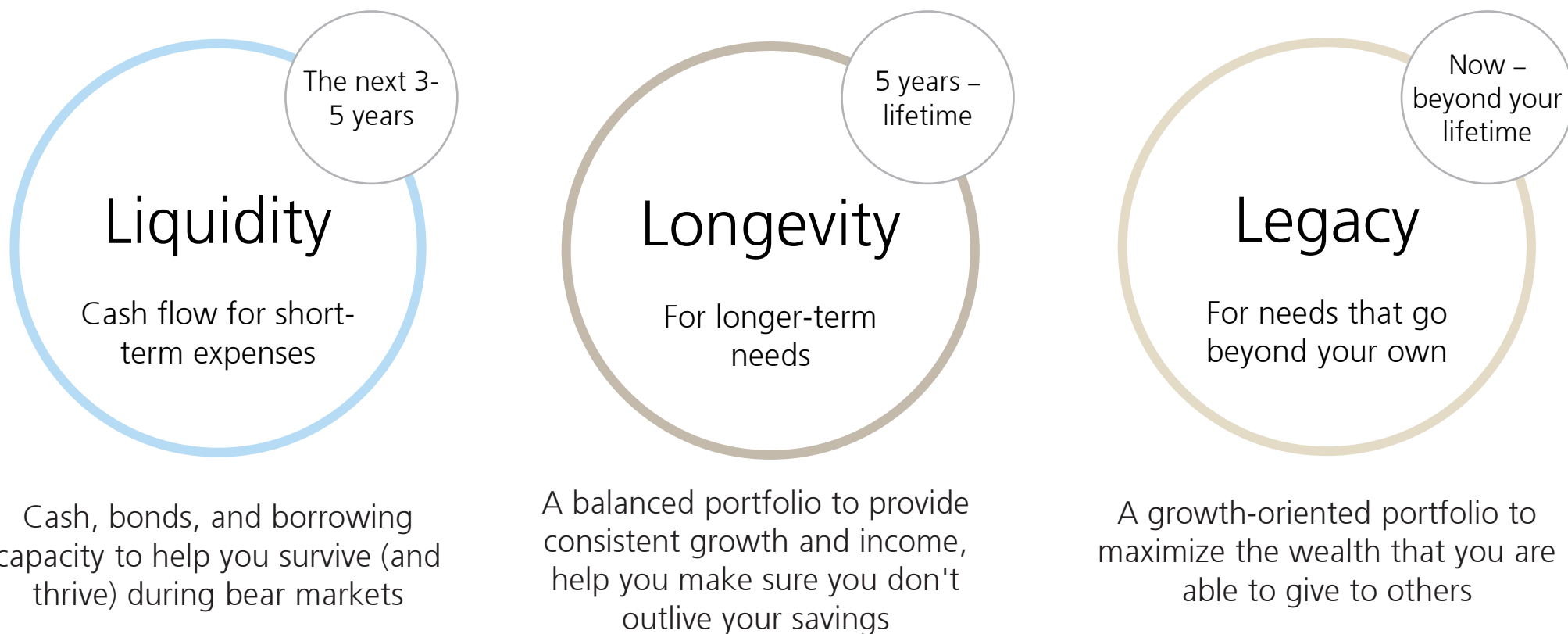


*Many of these professionals may not be employed by UBS Financial Services or its affiliates.

Timeframes may vary. Strategies are subject to individual client goals, objectives, and suitability. This approach is not a promise or guarantee that wealth, or any financial results, can or will be achieved.

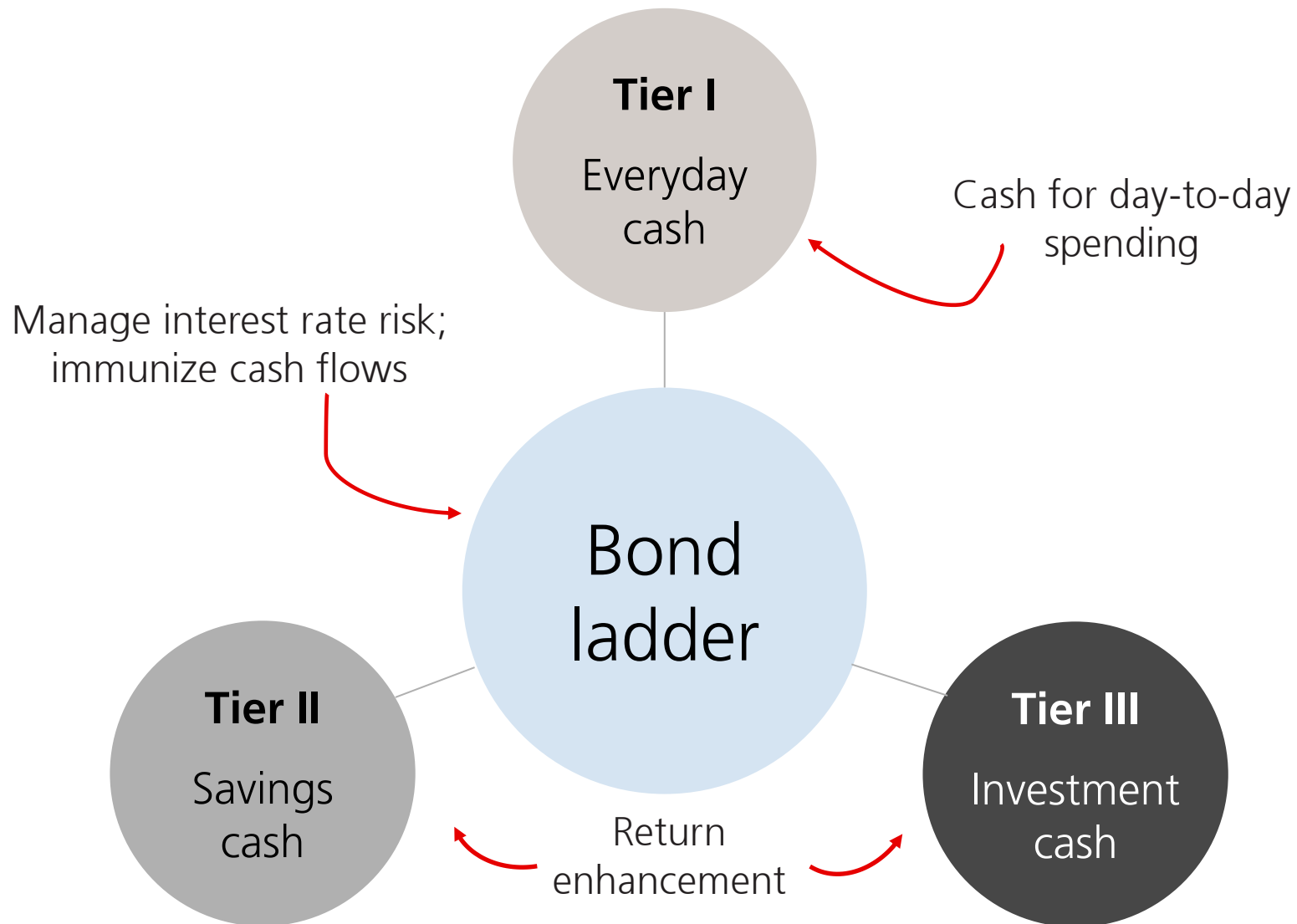
Three strategies to help you **achieve your goals**

The Liquidity. Longevity. Legacy. framework

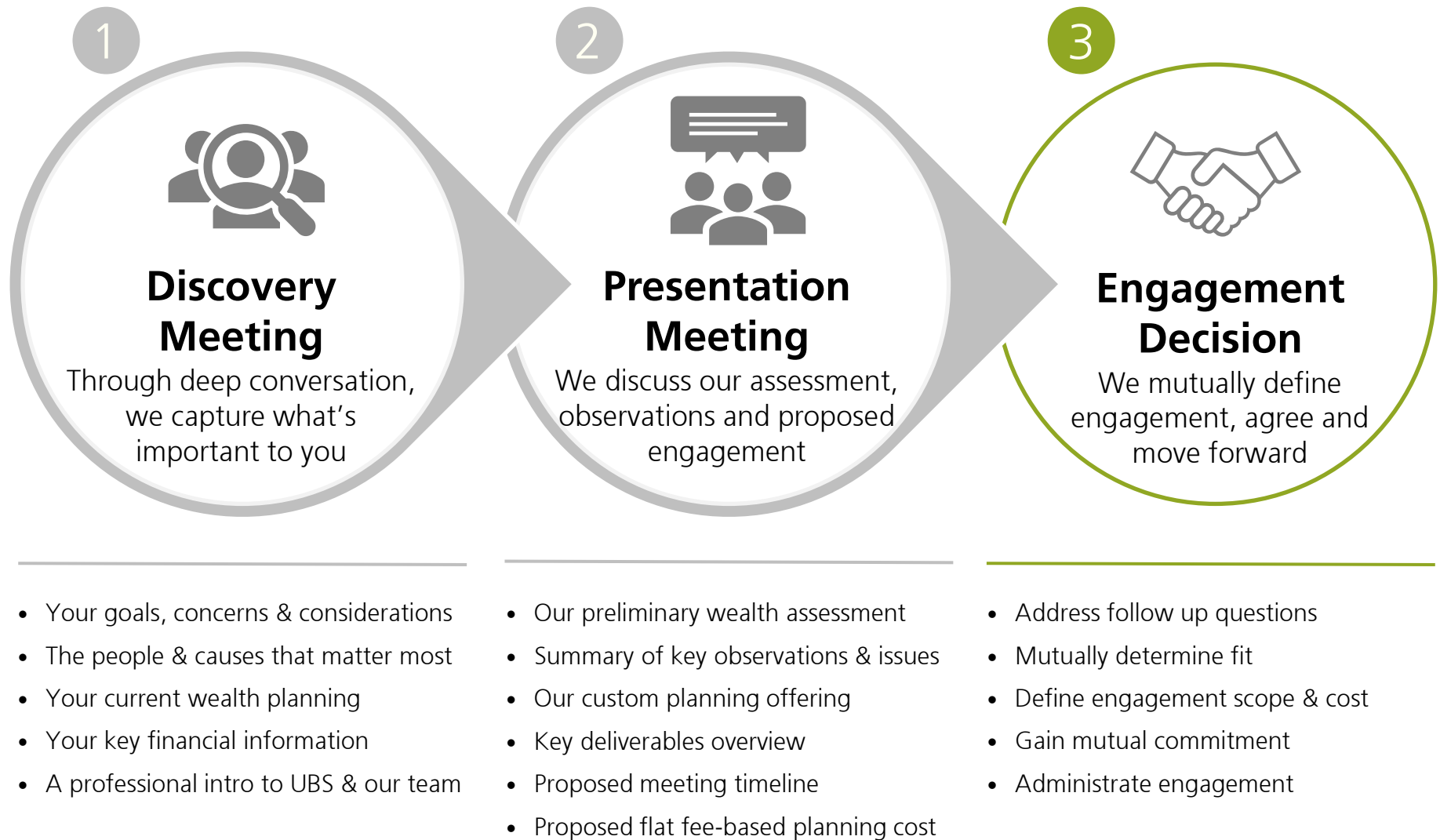


Strategies are subject to individual client goals, objectives and suitability.

Corporate cash management - liquidity strategy framework



Our new client engagement process



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