

SAGE HILL

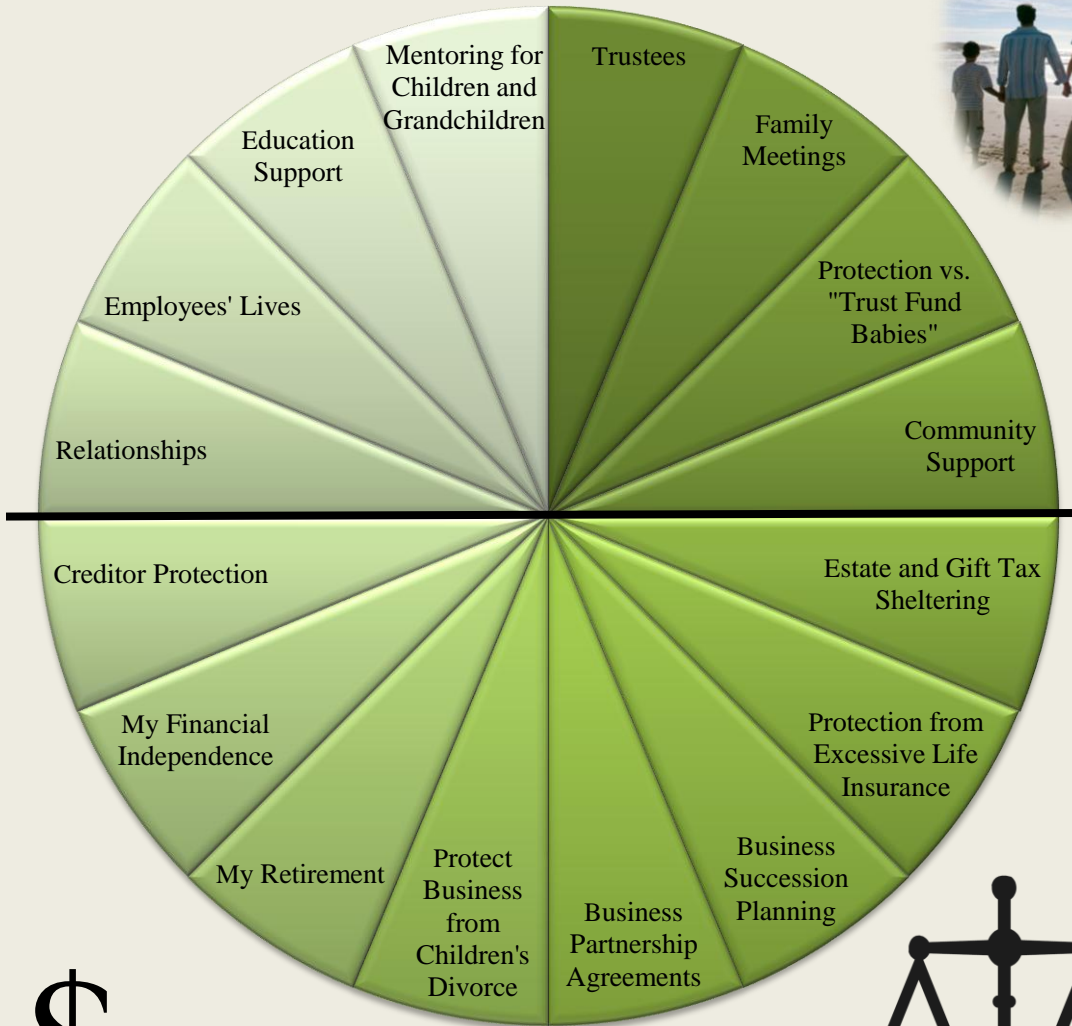
Advisory & Management

Do any of these goals apply to you?

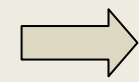
- Retain my business for my family (and not my Franchisor)
 - Or, provide for seamless liquidation to my business partner at my death (without stressing the business' cash flow)
- Mentor my child to take the reins
- Avoid Estate Taxes
- Reduce my life insurance costs
- Provide creditor protection Plus keep my business out of my child's potential divorce
- Don't make *trust funders* out of my children and grandchildren ... yet help them out if needed and mentor them to lead satisfying lives
- Make sure that my estate plan doesn't tear apart my family after my death
- Don't tell me to give away all of my assets to my children and charities ... I have a long life left & want to have the cash flow to enjoy it!
- Other:

Holistic Planning: Client Protocols

Strategic Plan Design



Plan Implementation



Sage Hill factors in all of the issues from your Strategic Plan by implementing side-by-side with your attorney, CPA, banker, and other professionals.



Post-Plan Results

