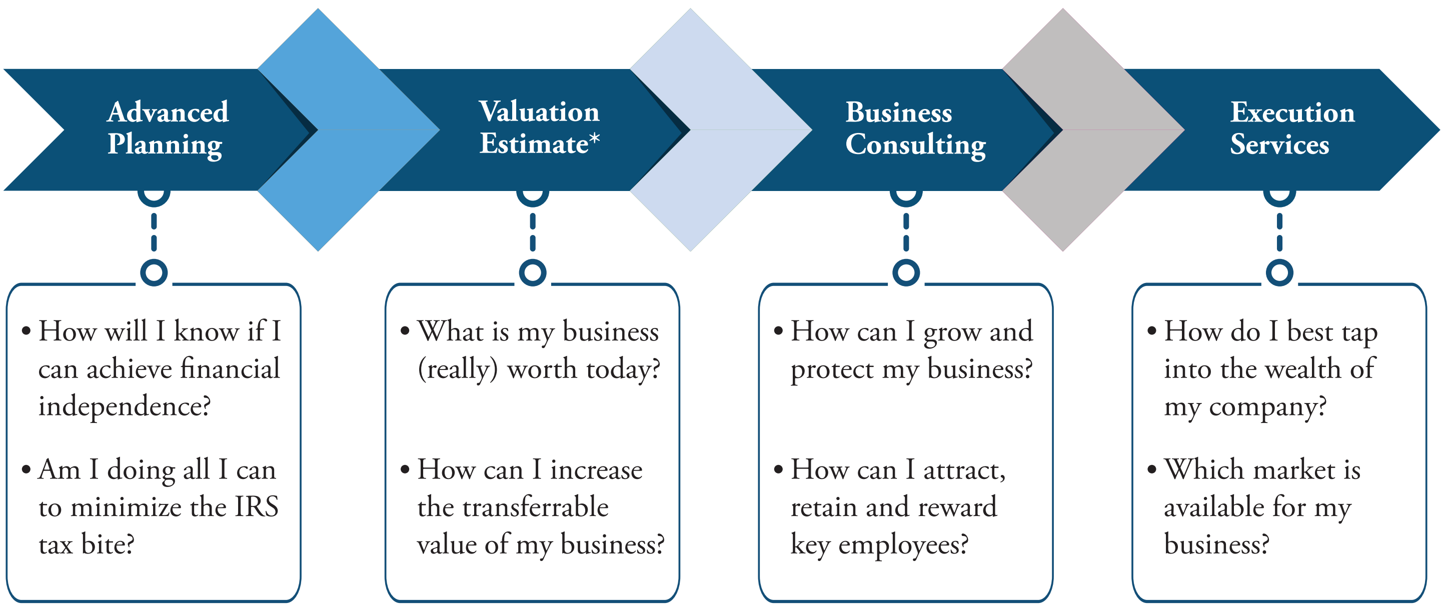
Integrated
BUSINESS ALLIANCE

The Challenges Business Owners Face

The industry has it all wrong. You have multiple advisors working on individual areas of your business and personal wealth. Our business services coordinate the wealth management, consulting and execution services, addressing the problem in the industry today.



Every Business Owner Should Operate Their Business Like It's For Sale Tomorrow

Clients with complex financial lives find it difficult to access the independent, objective advice needed to address and strategize their wealth management and business planning needs.

You need the necessary skills and expertise for the management, distribution and transfer of your wealth. Our team brings structure and intention to what may seem like an overwhelming endeavor.

Our Approach

At Integrated, we take a confidential, consultative approach with successful business owners to organize and implement an exit plan that also coordinates with their personal wealth management goals. Most of our clients have very competent advisors, however, they lack coordination in their existing planning. We look at your situation on a cross-disciplinary basis which allows us to identify both coordination gaps as well as planning opportunities. We explore all practical techniques with the goal to:

- Provide tax reduction strategies.
- Ensure the written plan matches your goals and provides an assessment of the success of your business.
- Increase the value and create a more transferable business.
- Attract and retain key employees and protect your business from the loss of key person/key employee, due to competition, health or death.
- Put a plan in place for the transfer of your business.

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Our Six-Step Exit Planning Process

1. Establish Exit Goals
2. Analyze Financial and Mental Readiness
3. Discover the Type of Owner You Are
4. Learn Your Exit Options
5. Know the Value of Your Exit*
6. Execute Plan - Roadmap for Your Goals

Solutions For Closely Held Businesses

Entity Planning

- Valuation Estimate*
- Cash Flow - Working Capital
- Financial Leverage
- Tax Planning
- Value Drivers
- Business Owner Personal Plan

Employee Benefits

- Group Benefits
- Qualified Plan
- Long Term Care
- Disability

Key Employee

- Key Employee Retention
- Deferred Comp. - Synthetic Equity
- COLI

Business Succession

- Buy/Sell
- Bench Strength for Internal Succession
- Financial Leverage
- Model Exit Options: Internal/External
- Equalization Business to Children

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*Clients are referred to Pinnacle Equity Solutions for an estimate of business valuation. Neither LPL Financial or Integrated Business Alliance offer business valuations. Pinnacle Equity Solutions, Integrated Partners and LPL Financial are separate entities. Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Integrated Partners, a registered investment advisor. Integrated Partners and Integrated Business Alliance are separate entities from LPL Financial.