

## Transition Planning



# YES!

- Transfer Strategies
- Goals Analysis
- Business Valuations
- Due Diligence & Acquisition Assistance
- Exit & Succession Planning
- Estate & Trust Planning
- Tax Planning & Compliance
- Financial Planning
- Cash Flow Modeling
- Contingency Planning

**PorteBrown**<sup>®</sup>  
**ACCOUNTANTS &  
ADVISORS**



### We are Focused on Transition Planning

If you are considering transitioning your business, whether for growth or eventual retirement, Porte Brown can help you achieve your long-term goals. We have a CEPA (Certified Exit Planning Advisor) that leads our experienced team in complex partnerships, including those involving family relationships.

Our business transition services include advising clients on mergers and acquisitions, conducting due diligence and developing and executing estate, trust, and exit planning strategies.

The transition planning process can include several components, from identifying your personal, business and financial goals to optimizing tax strategies and developing a plan of action to ensure that your business is transferred according to your terms.

Can Porte Brown help me leave my business on my terms and on my schedule? **YES!**

We can help you assess all your options and create a well-defined plan consistent with your long-term vision, so when the time is right, you will be positioned to exit your business on your own terms and schedule.

We would like the opportunity to learn more about your specific challenges.



**phone:** 847-956-1040  
**web:** [www.portebrown.com](http://www.portebrown.com)

**At Porte Brown, our strength lies in our experience.  
Our team includes:**

- Certified Public Accountants (CPA)
- Chartered Global Management Accountants (CGMA)
- Certified Construction Industry Financial Professionals (CCIFPs)
- Certified Valuation Analysts (CVA)
- Certified Exit Planning Advisor (CEPA)
- Certified Divorce Financial Analyst (CDFA)
- Certified Information Technology Professionals (CITP)
- Certified QuickBooks Professional Advisors
- Intuit Premier Reseller (IPR)
- Microsoft Certified Professional (MCP)
- Microsoft Certified Technology Specialist (MCTS)
- Microsoft Small Business Specialist



## Accounting & Business Solutions

In addition to our traditional accounting services, our technology experts help clients select, build systems with customized programs and reports, and provide onsite staff training and support. Our consultants are degreed accountants who have technical knowledge of numerous accounting software packages.



All trademarks and registered trademarks are the property of their respective owners.