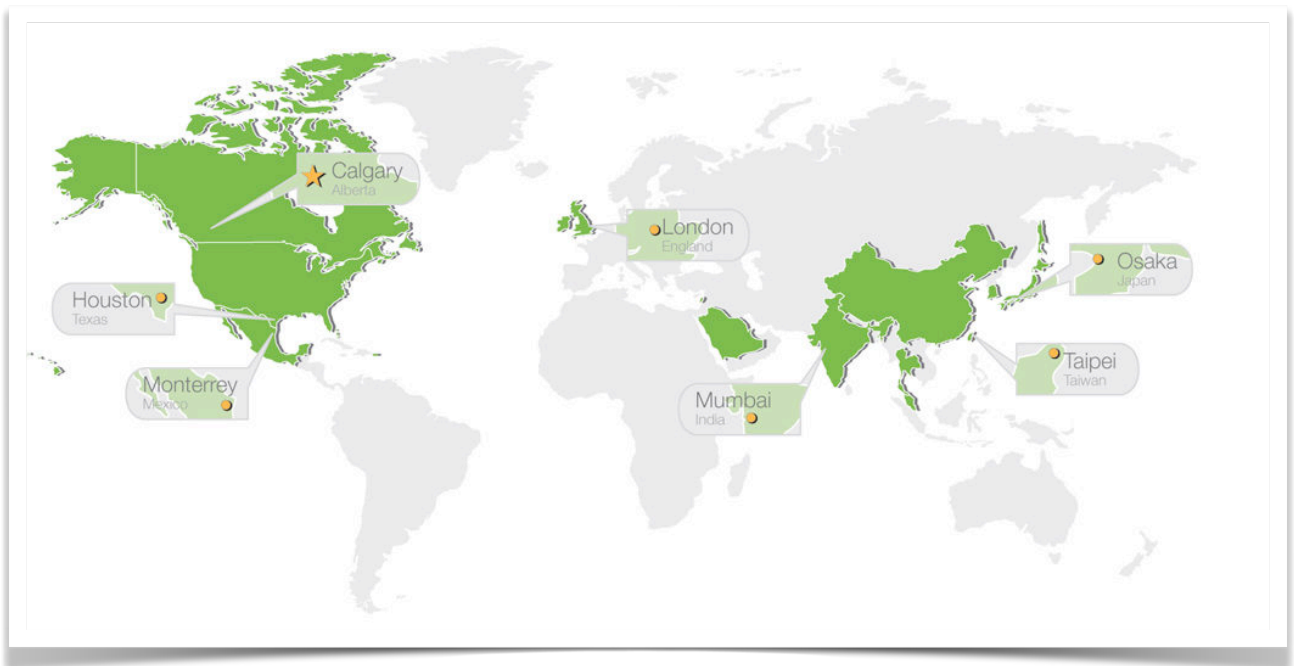


Creative Choices for Family Business Across Generations

Family Business: Goals, Ownership, Structure, Strategies ...
A Proposal.



October 2020

What do the stakeholders want?



Communication

The key to any successful process is communication among stakeholders.

Succession of a business to family or significant others without discussing it with them is foolish.

Somehow there is an assumption that leaving a business to family is simple, happens easily and simply and is something a family is happy to take on.

It seldom works that way.

Family stakeholders

Family is most important.

All too often family members work in a business but their hearts are not totally in it or they have legitimate but different goals.

Before an inter-generational transfer is needed, there has to be a meeting of the minds on what:

The hands on operators and

Those that have a more silent interest, visualize for the business.

In fairness, the next generations should have opportunities to be proactive, creating their own futures in relative peace.


LDI facilitates family in achieving whatever 'that' is.

Total, 'it' might take year or even five.

Investment / insurance now reduces or eliminates chaos, later.

Step One

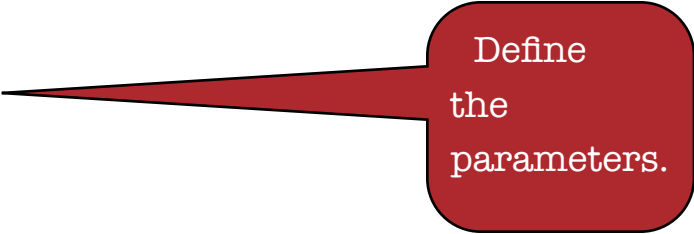
Recognize a need for creative choices.



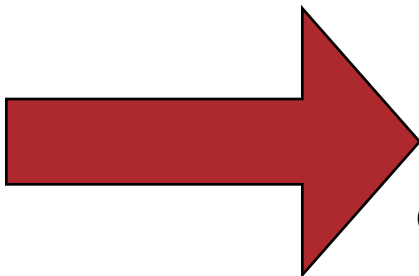
We should
explore this soon?
Coffee or lunch?

Step Two

Willingness to take action.



Define
the
parameters.



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