



**GENCREST**  
CAPITAL PARTNERS

MAXIMIZING OPPORTUNITIES FOR YOUR FUTURE.

*Comprehensive exit strategies  
for achieving business and personal goals.*

At GenCrest, our team of Certified Exit Planning Advisors (CEPA®) works with high-net-worth business owners to plan for and navigate every step of the journey. We take a strategic approach based on your objectives, ensuring a successful exit and transition to the future you desire.

**Expert guidance. Exceptional clarity.**

GenCrest's CEPA experts take a holistic approach, helping you maximize the value of your business to effectively position your company. We help strengthen the bottom line, and navigate the legal, tax and financial complexities of the exit process. Most importantly, we help you prepare for what comes next in life, preserving wealth as you explore new interests and staying ahead of the curve on opportunities and decisions for enhancing your life.



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Scan the QR Code to complete your  
complimentary initial exit readiness assessment.



## *Frequently Asked Questions*

### **Who should engage in exit planning?**

Surveys show that most business owners are dependent on the proceeds from a sale to fund their "next act" life goals. Unfortunately, fewer than 25% of them have a written plan. Exit Planning creates a road map for getting what you need out of your business, allowing you to set the time frame and financial plans for making it happen on your terms.

### **Will an exit plan force me to retire or sell my business?**

No. Developing an exit plan helps set your pathway for your future, showing you how far you have to go and when to get started. But it's up to you when the time and conditions are right for exiting your business.

### **Why should I consider engaging experts to help with my exit planning?**

As Certified Exit Planning Advisors (CEPA®), we are experts at asking the right questions, in the right order, and navigating the legal, tax and financial intricacies so you can make informed decisions and understand your options. Our "structured discovery" approach is proven to render the best results for owners and the clearest direction for moving forward.

### **Why would I want to discuss my "life after the business?"**

Multiple studies have found that 75% of owners are unhappy a year after their exit. Most go through an "extended vacation" of travel and bucket list goals. However, they eventually look for something to replace the activity, identity and purpose that their business provided for decades.

Our process is designed to let you experiment with your objectives. The outcome is a plan that is a realistic representation of your ability to leave in your own time frame, in the manner you choose and with the proceeds you need.

### **Can't I just list my business for sale when the time comes?**

As an owner, transferring your business could be the most important financial event of your life and have a tremendous impact on generational wealth. Yet only 15% of businesses that change hands get sold by business brokers or bought by private equity. The rest have to figure it out on their own. Having a comprehensive exit plan in place will give you an invaluable advantage over other business owners when the time comes.



Talk with us to get started.

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