

# CAPTURING THE VALUE OF YOUR BUSINESS

With Ed Barone,  
Marshall Welch, and  
Bob McCormack

## Preparing to exit your business is a “Process not an Event”!

Over 70% of business owners are over age 50 and have most of their assets tied up in the business, hoping to sell it in 3 to 15 years to fund their retirement plans. The business typically represents 60-80% of the business owner's net worth. If you are a business owner looking to maximize the value of your business and learn about the business exiting process, consider joining us for this half day workshop.

### Exit Planning Process:

- Financial Readiness - what is the Net Value Needed from your exit to maintain your lifestyle and create a legacy for heirs
- Mental Readiness - There are 5 types of business transfers, which one aligns with your exit goal?
- Owner Dependence - How dependent is the business on you? Creating a business that can continue without you can command a higher multiple.

### Entrepreneurial Operating System(EOS®) Overview:

- Developing a high performing self-managing Leadership Team
- Implementing a proven management operating system that will help maximize the value of your business
- Utilizing EOS® enhances each stage of the Exit Planning Process

### Are you ready to take the next steps to maximize your business?

Are you a business owner who has spent the last 10 – 30 years launching and growing a successful business, but are now thinking of how you will exit the business and maximize its value for your retirement and your heirs? At the conclusion of this value-packed workshop, you will walk away with tools to assess where you are now and the key steps you will need to take to maximize the sale price of your business when you decide to exit and move on. The sooner you plan for your desired outcome, the more likely you will achieve those results.

April 25, 2023  
8:30AM-11:30 AM  
Spring Run  
Professional Park,  
Conference Room,  
115 Farley Circle,  
Lewisburg PA

Limited seating.  
Registration required.  
RSVP to  
[Kate@EGWealth.com](mailto:Kate@EGWealth.com)

ARE YOU MAXIMIZING  
THE VALUE OF YOUR  
BUSINESS? WANT TO  
LEARN HOW?

IS THIS WORKSHOP FOR  
YOU?

Over 70% of business owners are over age 50 and have most of their assets tied up in the business, hoping to sell it in 5 to 15 years to fund their retirement plans.





Marshall Welch delivers engaging and actionable content that's tailor made for busy leaders. His events energize entrepreneurs who are driven to improve their businesses and the quality of their lives.

Participants in Marshall's dynamic keynotes and intense, hands-on workshops will:

- **Understand** the six keys to building a truly great organization
- **Roll up** their sleeves and confront organizational issues head-on
- **Learn** how to get everyone focused on achieving a clear company vision
- **Begin** to instill discipline and accountability throughout the organization

Marshall introduces a complete set of simple concepts and practical tools being used by thousands of entrepreneurial leadership teams to clarify, simplify and achieve their vision – the Entrepreneurial Operating System (EOS)®.

If you are a business owner who is considering exiting your business in the next 3 to 15 years, it is important to start planning for your exit as early as possible. This will allow you to maximize the value of your business and ensure that you have a smooth transition to retirement. A Certified Business Exiting Consultant (CEBC), like Ed Barone, can help you develop an exit strategy that aligns with your goals and protects your family's financial future.



Even if you're not thinking about your business, understanding, and maximizing your business' value is critical. Talking early with an M&A advisor like Bob McCormack can help to ensure you avoid the common pitfalls of selling your business and help understand what is dragging your valuation in the market down. Early preparation can lead to dramatic changes in a company's valuation and your bottom line.

#### **Ideal Audiences:**

Perfect for groups of growth-oriented business owners and leaders, including:  
Business Peer Groups  
Industry Associations  
Trusted Advisor Groups



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