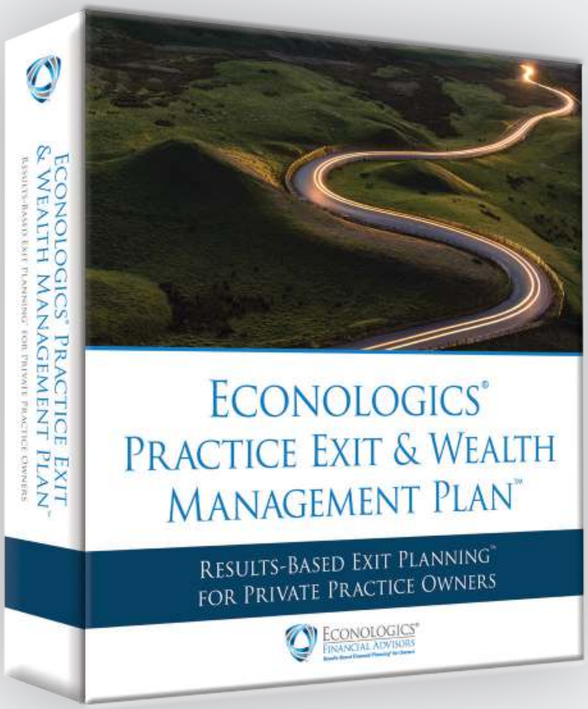
The Econologics Practice Exit & Wealth Management Plan

ECONOLOGICS®
FINANCIAL ADVISORS
Results-Based Financial Planning® for Owners



Deciding it's time to exit your business is a big decision and likely your largest financial transaction. Make sure you have a solid plan for how to handle taxes and manage the sale proceeds BEFORE you arrive at the closing table.

The sale transaction can bring doubt and concern about the future. But you don't have to go into the process alone.

The Econologics® Practice Exit & Wealth Management Plan™ is a comprehensive step-by-step guide for owners that takes the guesswork out of tax strategies for the sale, income planning for retirement and on-going wealth management of the proceeds.

The Econologics Practice Exit & Wealth Management Plan

The actual sale transaction itself is an involved process with many steps and considerations. There are pricing and financing terms, non-compete agreements and many more complexities you will likely be faced with.

The Econologics Practice Exit & Wealth Management Plan is designed for owners of a professional practice who are currently looking for offers or in the process of selling their practice.

This is a comprehensive plan that focuses on assisting owners in the optimization of these two life-altering financial decisions:

- How to maximize the practice sale transaction
- How to maximize the reinvestment of the proceeds for retirement income

Step 1
ASSESS

Complete an assessment that compares your current financial condition to an optimum one. Visit **FinancialProsperityIndex.com** to take the assessment today

Step 2
DISCOVER

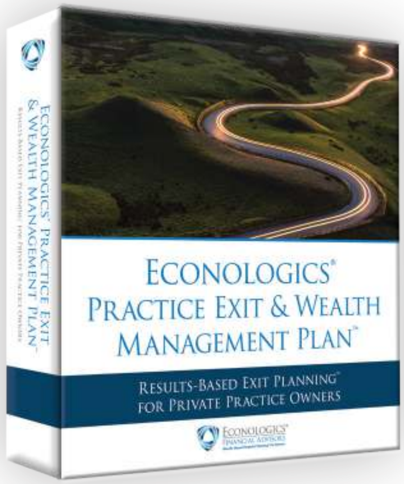
Meet with a specialist to review your assessment and help discover what needs to be done to improve your financial condition.

Step 3
PLAN

Get a customized financial plan from a trained, licensed advisor who specializes in working with practice owner households.

Exit Your Business with Ease

Econologics® Practice Exit & Wealth Management Plan™



The Practice Exit & Wealth Management Plan™ is a written financial plan that will address 4 facets of the business sale, allowing you to achieve an optimum level of income and protection through retirement.

It is a wealth management program that will optimize the practice sale as well as the analysis and implementation of highly customized income and wealth preservation strategies.

The Econologics Practice Exit & Wealth Management Plan includes:

1. **Financial Analysis:** An analysis of the practice sale that includes data from the sale offer or letter of intent integrated into an Exit Strategies Solutions™ Summary Report. This provides valuable information on your financial readiness, and the tax effects of the transition on your income.

2. **Wealth Management & Asset Protection Plan:** Specifically addresses the household plan including debt management, income stream analysis, taxes, asset allocation and investment management recommendations.

3. **Strategic Planning Checklist:** We provide checklists to ensure you take reasonable precautions to protect your assets from any kind of loss.

4. **Post-Sale Planning:** Mapping out life after the sale. Evaluates and plans what life will look like after ownership so that new goals are set for the future.

To see if this plan is right for you take the Financial Prosperity Index Assessment and schedule your Strategy Session with an Econologics Specialist today!

www.FinancialProsperityIndex.com

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