



## EXIT PLANNING: A GUIDE TO THE PROCESS

THE SINGLE MOST IMPORTANT FINANCIAL EVENT OF A BUSINESS OWNER'S LIFE!

**LEARN HOW TO TAKE CONTROL OF THE PROCESS, DEPART ON YOUR TIMETABLE, TO THE SUCCESSOR(S) OF CHOICE AND FOR OPTIMUM VALUE.**

### IDEAL AUDIENCES

- ❖ Business Peer Groups
- ❖ Chief Executive Officers
- ❖ Industry Associations
- ❖ Trusted Advisor Groups

### FORMAT'S:

- ❖ Keynotes
- ❖ 1-3 Hrs.
- ❖ Half-Day Workshop

### PARTIAL SPEAKING LIST:

- ❖ Vistage
- ❖ CEO Roundtable
- ❖ Women's Presidents Organization (WPO)
- ❖ Club Entrepreneur
- ❖ Entrepreneur's Organization (EO)
- ❖ MN Society of CPA (MNCPA)
- ❖ Financial Planning Assoc- MN
- ❖ Exit Planning Institute- TC
- ❖ Univ of St. Thomas -Family Business Center
- ❖ Fidelity Bank
- ❖ Alerus Bank
- ❖ WCCO News-Business Breakfast Series
- ❖ MN Mechanical Contractors
- ❖ Consulting Engineer Council

### BOOKING INFO:

[drh@exitplanstrategies.com](mailto:drh@exitplanstrategies.com)  
651 426 0848  
[www.exitplanstrategies.com](http://www.exitplanstrategies.com)



### Participants Will:

- Discover a Seven Step Process™ needed to design a comprehensive Exit/Transition Plan.
- Identify the advantages of an experienced Advisory Team when executing an Exit/Transition Plan.
- Explore issues surrounding valuation, tax minimization, value enhancement, challenges facing "internal" and "external" transitions, importance of having a "back-up" plan, and legal/estate planning techniques.

### DYANNE ROSS-HANSON

#### **President/Founder of Exit Planning Strategies, LLC.**

Helping business owners (*industry generic*) to develop written, intentional ownership transition plans. Dyanne directs an inter-disciplinary process for owners and their Advisory Team to explore planning options, map realistic exit strategies and develop an Action Checklist to accomplish the owner's objectives.

She is a published author in **Star Tribune, Upsize Magazine, Minneapolis St. Paul Business Journal, CFMA Building Profits, INC. Magazine** and other media.

### TESTIMONIALS

"Dyanne is clear, concise, practical and **extremely knowledgeable**. My group wanted more! She relates to her group and makes a complicated topic feel doable". *Myrna Marofsky – WPO: Mpls, MN*

"Great content...very useful! This is a **MUST** for all Business Owners. "**5-Star**"!!! *David Spann- Vistage Chair: Boise, ID*

"Great presentation! Dyanne had a masterful grasp on the information and came across extremely **knowledgeable & credible**". *Eric Wingerter - Vistage Chair: Covington, LA*

"Dyanne's presentation was **excellent**. Very relevant, spot on and helpful to my Vistage CEO's. They found her delivery excellent and content very helpful as they consider their exit strategy. Thanks so much for coming out to **New York**"! *August Ceradini- Vistage : NY*

"I would **highly recommend** Dyanne as a knowledgeable Advisor/Speaker/Partner for any business owner considering the development of their Exit Strategy". – *Julie Stokes, Fidelity Bank: Mpls, MN*

"There was a wide variety of experience in the room and everyone took home gold nuggets! Very interesting and thorough. Overall, **Dyanne is superb**"! – *KL Wells; Vistage Chair: Eugene, OR*