As a successful entrepreneur, you know how to run your business. The question is, do you know how to stop running it? We understand the challenges of succession planning, not only from a financial perspective, but a personal one as well. With clarity of vision, we can guide your business to the next stage.

Building a succession plan will likely be one of the most difficult challenges you will face as an entrepreneur. The risk taking, problem solving and forward thinking strategies you developed while leading your business may not be as useful when transitioning out of a life’s work.

We have worked with companies of all sizes from across the country, investigating the available options from a personal and family perspective and from a tax, commercial, financial, risk and regulatory perspective. Whether you hope to pass on your business to a family member or sell to an outside suitor, we can guide you through a comprehensive plan that enhances wealth and positively affects the family dynamics.

The accountants and advisors of Collins Barrow have the experience and expertise necessary to ensure your exit plan allows you to reap the full benefits of your hard work. Our approach, process and diligence are second to none. We are the trusted advisors of choice.

www.collinsbarrow.com
Design Your Future

You have invested more than just time and money into your business. On a financial as well as personal level, we are focused on ensuring you enjoy the full benefits of your hard work.

Developing and executing a succession plan is a unique and often difficult part of your journey as an entrepreneur. To get the rewards you deserve, you must consider a number of factors:

Understand Your Options
Do you have a suitable son, daughter or relative to transition the business to? Or are you ready for a clean-break sale, ending your involvement with the venture completely? Passing on to a family member or orchestrating an external sale are just two of the many possibilities available to you. You might consider disposition strategies that maximize individual asset values, working with current management on a buy-out, or appointing a caretaker manager that keeps you connected with your venture. In all cases, it is imperative you understand the tax, financial and legal impact these decisions will have. Collins Barrow can offer an unbiased review of each option, as well as provide advice on which path to choose.

Plan Ahead
Determining the fate of your business can be a difficult challenge to face – one that becomes increasingly more difficult the longer you wait. Delaying the decision-making can lead to a more stressful transition when the time eventually arrives, or worse, it can limit your options and leave less in your pocket after tax. Collins Barrow professionals can assist with reviewing and developing insurance and other strategies to maximize value and wealth. Maximize the potential of your business by starting early on a comprehensive plan.

Benefit From Unbiased Advice
Our role as your trusted partner is to provide informed, objective and focused advice and opinions – an invaluable perspective when dealing with succession planning. We are dedicated to serving the complex and diverse needs of our clients and our goal-oriented, adaptable approach ensures you will achieve your ultimate objectives.

At Collins Barrow, we understand how important your business is to you. With customized service and innovative solutions, we are committed to creating a solid succession plan that meets your unique goals. See the difference that clarity makes.

About Collins Barrow

Collins Barrow is committed to the highest level of integrity, quality and professionalism and provides clients with solutions in the area of Audit, Tax and Transaction Services.

Collins Barrow is one of Canada’s largest associations of Chartered Accounting firms and the eighth largest group of chartered accountants in Canada. Known as Canada’s mid-market alternative for audit, tax and advisory solutions, we have developed a reputation for being a real choice for quality and value added financial advice due to the depth and breadth of in-house skills, customized offerings, commitment to excellence in customer service and our global reach. Our unmatched service and deep financial offerings make Collins Barrow the right choice for maximizing shareholder value.

We serve companies at all stages of their development from large publicly traded companies to emerging and owner managed businesses. Our clients come from a cross section of industries including: Private Equity, Manufacturing, Industrial, Wholesale, Retail and Distribution, Professional Services, Farming and Agriculture, Financial Services, Real Estate and Land Development, Hospitality and Entertainment, Technology and Communications, Energy and Mining, Biotech and Not for Profit. Our understanding and firsthand experience in the trends that are impacting these industries continues to prove that our professionals are well positioned to offer valued and effective solutions.

Our global reach extends beyond Canada into 120 countries worldwide through Baker Tilly International, the eighth largest accountancy and business advisory network in the world. Together, we offer clients an established platform and access to the highest quality resources for audit, tax and transaction support in the global market place.

Independent, responsive and trusted. We are the true national alternative. Collins Barrow, Clarity Defined™

To learn more please contact one of our Practice Leaders or visit us at www.collinsbarrow.com