

# Cashing out and moving on

A webinar to help owners of SME's preparing for exit to position themselves and their business to accomplish their personal, financial and business goals.

We look at how to ensure financial security for your family, how to release wealth trapped in the business and how to best protect your legacy and ensure the business's future survival.

## **Methods of Exit: Shawn Gallimore - Alextra Accountants**

- What business sale options are available to me?
- How do I ensure continued business growth and retention of key staff leading up to exit?
- How do I ensure that I tax efficiently extract funds leading up to exit?

## **Preparing for Exit: Jonathan Aldersley - Butcher & Barlow Solicitors**

- Why do I need a Shareholders' Agreement?
- How should I restructure my business in preparation for exit?
- What can I offer key employees by way of share options?
- What do I need to consider in an exit plan?

## **Pensions and Protection: Steven Pepper - Alextra Wealth Management**

- How much cash will I need on exit to be financially secure in the future?
- How do I protect my business in the event of early death or ill health?

## **Wills and LPA's: Chris Hopkins - Butcher & Barlow Solicitors**

- Why is it important that my Will is up to date and I have an LPA in place?
- How can I mitigate the IHT liability on my estate?



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