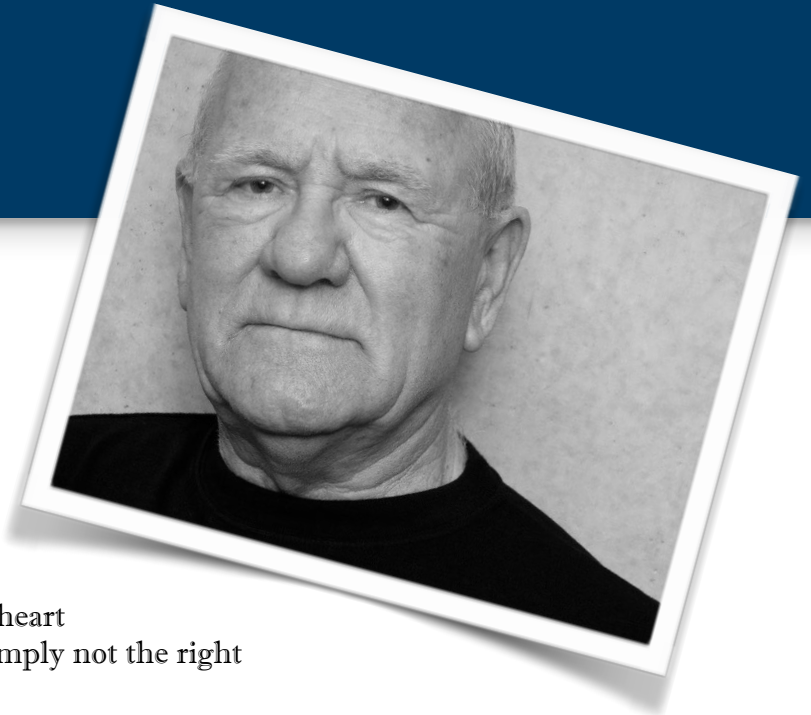




COPPERTREE



Meet Sam...

"I am so ready to leave this place."

Sam had this same thought cross his mind every morning since his 65th birthday passed 8 months ago.

His plan says he should be retired by now. His heart says the conditions aren't 'just right' yet – it's simply not the right time to turn the business over to the kids.

Sam had grown this business from a few hundred thousand dollars in revenue to over \$20 million since taking over after his father-in-law suffered a stroke 25 years ago. If he left, would the company continue to do well? Would it survive?

"It's not like Josh and Katie aren't already doing great things in the business," he thought. "Most of the growth has happened in the last five years – as they became more active leaders. Katie has the vision, and Josh has a steady-command of the operations. Katie had identified several successful opportunities, one that could double revenues and triple profits over the next five years. Josh was highly skilled in turning these idea into reality on the plant floor. They were a strong team."

Even with all the positives, Sam was still unsure. He wasn't confident they were on the same page regarding how to run and grow the business. This was a huge concern because he didn't want the business to effect their relationship with each other.

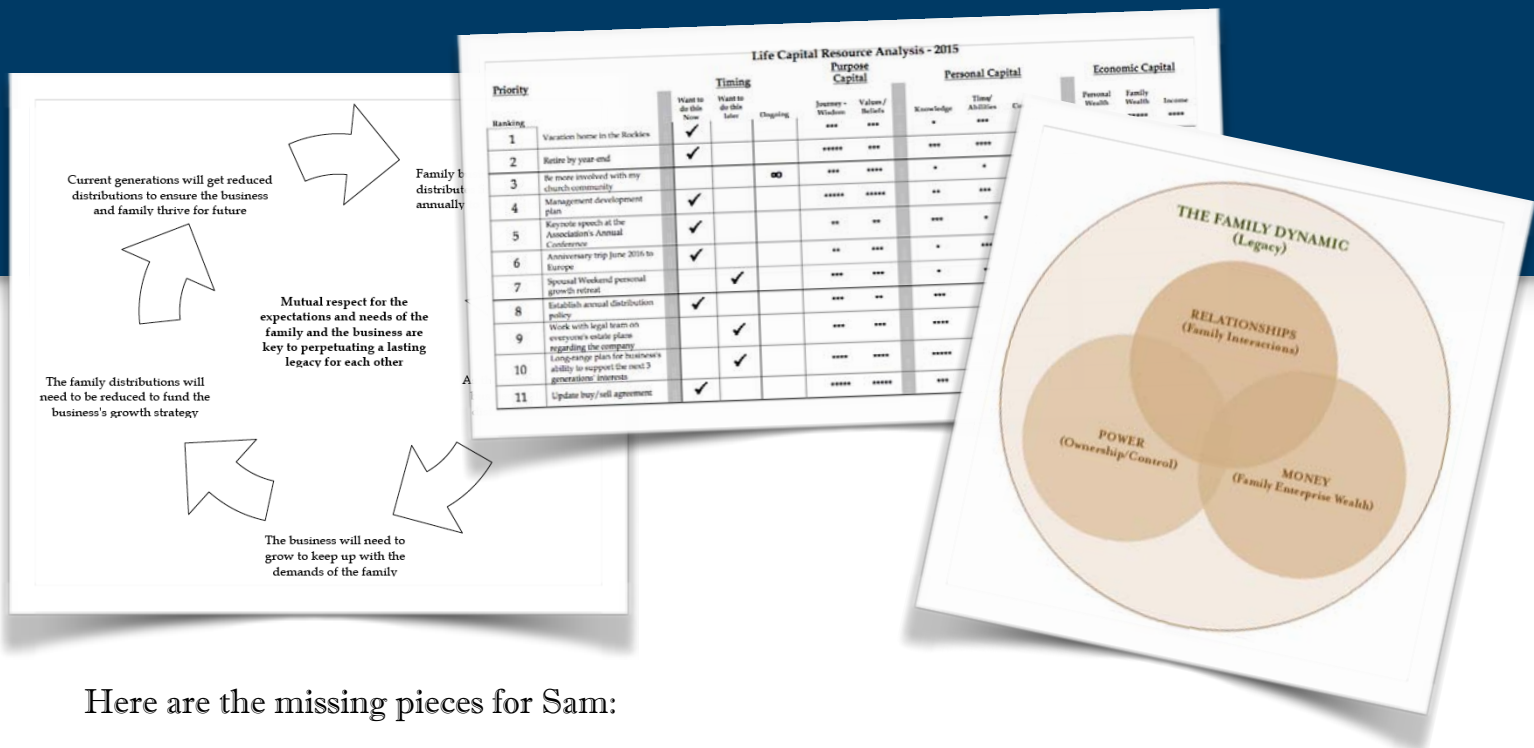
And, there was another problem – money. As the only child, Sam's wife, Suzie, inherited the business from her father when he died. For them to move on with their lives, they needed to figure out a way to monetize their interest in the business before Sam could step away from the company.

That's where we come in. We're experts at aligning family and business values so a long-lasting legacy can be created.

What Jenny Says...

Sam has done a good job of establishing a strong foundation for both the family and the business as he is getting ready to turn the reigns over to his children. As a result of his trust and confidence in them, they have proven themselves to be capable and trustworthy stewards of the family business for the next generation. Why, then, does Sam still have concerns that the time isn't 'just right?'

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Here are the missing pieces for Sam:

- How can Sam be confident his children will be able to successfully move the business forward while also maintaining and cultivating a close relationship?
- What needs to be accomplished for the business to purchase the ownership and control from Sam and his wife?

Sam is clear – he does not want the family business to get in the way of his children having a close relationship with each other. This is a great starting point for the family to begin to define what is important to them.

Using the Success Mapping Process, Coppertree’s legacy development experts work with Sam and his family to tackle his two missing pieces – addressing issues like:

- How will they agree to make values based decisions together – both as a benefit to the family and to the business?
- How do they work their way through conflict in a way that supports their desire to remain close?
- What does the ownership succession need to look like to support Sam and his wife as they approach the next chapter of their life?

Thanks to Sam’s hard work and planning efforts to date, chances are, his children will not be surprised or unprepared when Sam decides things are finally ‘just right’ and he is ready to retire.

With Coppertree’s help, that time is guaranteed to come sooner rather than later and the family will be in a much stronger position before, during, and after this transition.

Their bonds are stronger. Their legacy will last longer.

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