

Career Transitions

Where are you going?

- What are your Personal Values & Goals?
- Are you starting a business?
 - What is your passion?
 - Are you offering a Product? Service? Both?
 - Who/What is your Market?
 - What funding is available?
- Are you selling a business?
 - How do you determine a Fair Value?
 - Who are your Potential Buyer(s)?
 - Which Professionals should be engaged in the process?
- What are your Resources?
 - What are your current Assets and Liabilities?
 - How will your benefits change?
 - How well does your income meet your expenses?
 - What is Your Experience?
 - What do You Know?
 - What are Your Natural Abilities?
 - Who do You Know? (Network/Connections)
- What are your Qualified Plan Options?
 - Income Needs Tax Issues to Consider
- If relocating, what should be considered?
 - Climate Cost of Living
 - Crime Rates Health Issues
 - Family Proximity Tax Differences
- What other Experts may help market YOU more effectively?

Today is the first day of the rest of your life. **It's a new beginning!** Let us help you improve the probability of a more positive outcome by walking you through a collaborative planning process that is focused on your unique situation.

To get started, please complete our secure online confidential questionnaire so we can schedule a time to meet and discuss who and what is important to you at this time.

After you have submitted your questionnaire, we will contact you to schedule a 60-minute complimentary consultation to determine what your needs are, how we might work together, and if our relationship is the right fit for you. Upon mutual agreement, we will either continue working with you or refer you to other appropriate professionals.

Your ultimate success is up to you, and is our greatest desire. We look forward to hearing from you soon!