

The Succession Consulting Group is a service offered by Mutual of Omaha. It provides training and support that can assist insurance producers, advisors and their business-owner clients in their efforts to begin formulating a business succession plan.

## Here's how they can help

- ❖ Providing materials that can help motivate and engage your clients
- ❖ Reviewing your fully-completed Succession Consulting Group Factfinder
- ❖ Working with you and your marketer to develop a preliminary report with their observations, based on the information from the Business Succession Planning Factfinder
- ❖ Participating in conference calls with you and your client's other advisors (if desired)
- ❖ Presenting an analysis with explanatory material (regarding planning ideas, types of agreements, concepts, etc.) that are specific to your client's plan
- ❖ Helping you provide undeniable value to your client and your client's entire exit-planning



## Business Valuation can be used to:

### Properly value the business

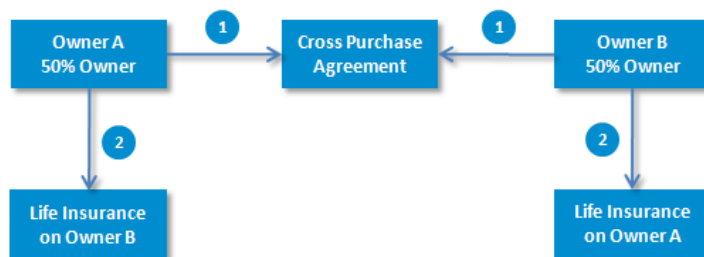
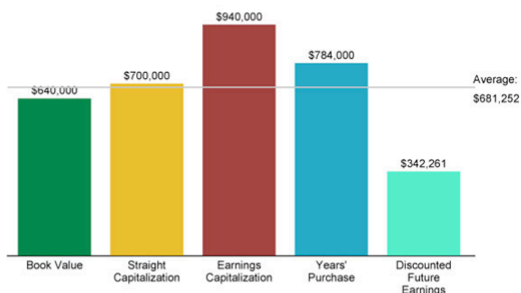
Perform calculations for five different valuation methods accepted by the IRS. Present the results with a complete and professional printed summary presentation.

### Explore various owner needs

Explore solutions based on the relationship between the owner, the form of business, and the owner's continuation preferences. **Explore different funding needs**

Consider potential solutions and determine the funding requirement for the solution amount.

### Business Valuation Valuation Graph



For outstanding service and exceptional solutions call:

**813.875.6331 (local) • 800.967.7661 (national)**

310 SOUTH DALE MABRY HWY., SUITE 210 • TAMPA, FLORIDA 33609

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