



 ONEDIGITAL | PRIVATE CLIENT

Succession Planning

Preserve What You've Built. Prepare What's Next.

Succession Planning for Business Owners

You've spent decades building something remarkable — but transitioning that legacy requires as much intention as the business itself. Our Private Client group at OneDigital helps business owners quietly and confidently prepare for what's next, whether that means transferring ownership, maximizing value, or ensuring continuity across generations.

Our role? To simplify the complex, protect your life's work, and give your family clarity for the future.

Why Strategic Succession Planning Matters

For successful entrepreneurs, family business leaders, and post-liquidity executives, succession planning is a pivotal opportunity to shape the future — of the business, the family, and the legacy they leave behind. Navigating this transition calls for intention, discretion, and expert coordination.

Key considerations often include:

- ▶ Minimizing tax exposure and managing estate liquidity
- ▶ Aligning decision-making across generations or leadership teams
- ▶ Preserving business value through a structured transition
- ▶ Ensuring wealth and values are carried forward with purpose

Our team works alongside you to anticipate risks, bring structure to complexity, and design a clear, tailored plan that supports your long-term goals — with confidence and continuity at every step.

Our Succession Services Include:

Strategic Wealth & Legacy Planning

We help clients align their wealth and values across generations, ensuring fairness, clarity, and long-term family harmony.

- » Estate tax minimization and estate equalization
- » Gifting strategies and intergenerational transfers
- » Post-liquidity retirement and wealth transition planning

Business Transition & Liquidity Strategy

Whether selling to a third party or preparing for succession, we coordinate every aspect of the transition to protect business value and unlock liquidity.

- » M&A and Corporate Finance sell-side services
- » Business valuation and deal readiness
- » Working capital and post-closing support

Continuity & Risk Mitigation

We design for stability, ensuring the business can thrive beyond your leadership, with proper protections in place.

- » Buy-sell agreement design and funding
- » Executive team succession and contingency planning
- » Business and family continuity and risk oversight

**Your legacy deserves intention.
Let's ensure it endures — with clarity, confidence, and purpose.**

Talk to your OneDigital Advisor to begin the conversation.

Your Private Client Team



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Are you ready to take charge of your financial future?

Let's talk about what really matters to you and your family. Together we'll create the structure and flexibility you need to meet your goals and live your best life now.



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