

Don't lose your family  
when transitioning  
your business.

Get directions first!

SuccessCare<sup>®</sup>

A 3D-rendered scene with a red background. In the center, a tall, thin orange pillar stands. Several white directional signs are attached to the pillar, pointing in various directions. In the foreground, a man in a blue suit and a woman in a red top are looking at a map. A child in a green shirt is sitting on the floor, looking up at the signs.

# 2



It took me thirty years to build this business to what it is today.

How can I be sure I won't lose all my equity when I retire?

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Alternate Message:

It took me thirty years to build this business to what it is today.

I have a plan to ensure I won't lose all my equity when I retire.

# 3



It was easier for Mom and Dad to Build the business from scratch; they had nothing to lose.

What happens if it all falls apart when I take over?

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Alternate Message:

It was easier for Mom and Dad to build the business from scratch; they had nothing to lose.

I have a plan to make sure it doesn't all fall apart when I take over.

4

My son feels his dad can't let go of the business,  
but my husband feels he still has a lot to offer.

How can I get them to connect?



Alternate Message:

My son felt his dad wouldn't let go of the business, by my husband felt he still had a lot to offer.

Now they are connected and understand each other's needs.

# 5



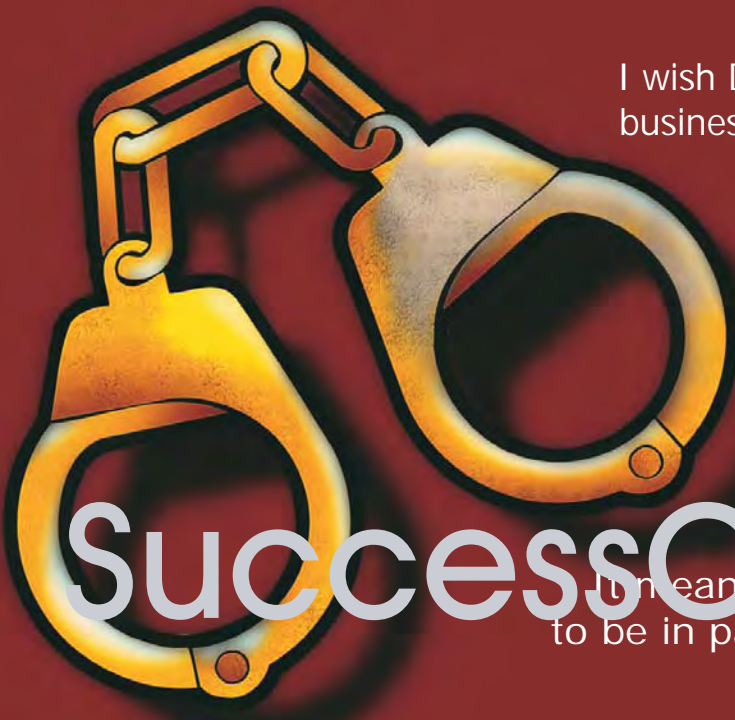
No matter how hard I work, I never seem to measure up to Dad's standards.

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Alternate Message:

We worked at clarifying expectations for family members who work in our family business. Now we know exactly how to measure up to Dad's standards.

6



I wish Dad hadn't left the business to all four of us.

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It means we were forced to be in partnership together.

# 7

When they were this age, they were a team.

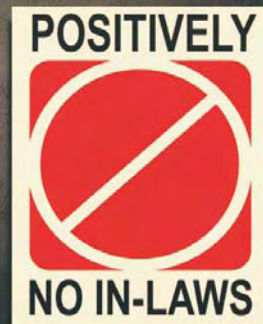
But today, our family business has driven them apart.

A photograph of two young children sitting on a large sandcastle on a beach. The child on the left is wearing a blue hat and a striped shirt, holding a green shovel. The child on the right is wearing a blue hat and a yellow shirt, holding a green bucket. The background is a bright, hazy sunset or sunrise over the ocean.

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# 8

My husband would love to be a part of our family business but my father doesn't consider in-laws as part of the family.



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# 9



I have some great ideas to grow our business, but the rest of the family don't seem to care what I think.

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# 10



My father and brother  
ignored the underlying  
issues for years.

Now the situation  
is unbearable.

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11

Dad didn't plan on leaving us so soon.

He said there would be plenty of time  
to show me the ropes.

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# 12



I won't make the mistakes  
my father made.

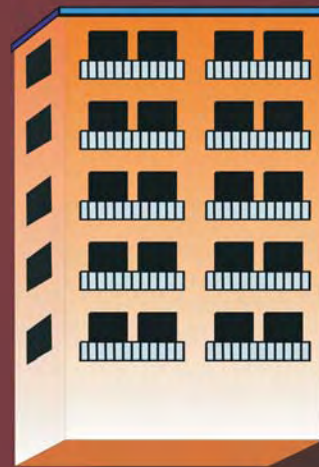
I will plan ahead and  
prepare my child for taking  
over the family business.

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# 13

My business has grown considerably over the past 35 years.

How much of it will the government want if I sell?



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# 14

By the time my husband agrees to take time away from the business, we'll be too old to enjoy life.



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# 15

Everyone wants a piece of me. No one really understands what it takes to run this business.



# 16

Beginning with the End  
in mind.



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STEWARDSHIP  
HOUSE