

Keeping More of What You Earn

Oftentimes successful business owners notice their company generates more tax liability than net income. This session explores several often-overlooked yet proven strategies for taking money that might have otherwise been lost to taxes, and instead directing it to grow the business. Better yet, we'll introduce strategies to direct the money to the owner's net worth and protected balance sheet.

The Seven Fundamental Cash Drivers

This session arms business owners to aim at what financially matters most in their companies. Most business leaders count on the business for their financial future, but do they know the cash drivers that directly impact profits and enterprise value? We will teach:

- The Seven Fundamental Cash Drivers
- How to pinpoint business issues and provide actionable insights
- How understanding key cash drivers can impact company performance this year, next year, and beyond

We'll share actionable strategies you can take and use immediately.

Personal Financial Strategies for Owners: Wealth Management, Advanced Asset Protection, and Estate Strategies

Do business owners really want what took us decades to build up, to be vulnerable to a single lawsuit or creditor? How do we manage our wealth, not just account by account, but rather with an eye on the risk adjusted returns of all our assets? When we approach our estate, how do we get what we want to who we want without paying significant taxes, while still having satisfactory strings of control? This session looks at several advanced approaches to solving these inquiries.

Succession Strategies: Making It Work for All Sides

Successful business owners often presume that the sale of their business will be a significant source of capital or income for retirement. The statistics of selling a closely held company to an outside buyer are not promising. Finding the capital needed for a family member or partner to buy the company can be a challenge as well. In this session, we share performance insights and strategies for producing enough capital for the seller, yet also building a situation where the buyer can achieve what they need to be profitable.

Advanced Charitable Strategies: Producing Significant Business and Personal Tax Savings While Impacting Causes You Care About

Most people are aware that the IRS provides deductions for charitable gifts given in the tax year. Fewer are aware of more advanced charitable tax code that allows for even greater tax impact. Such strategies include the ability to offset current ordinary income, capital gains, and potentially even eliminate estate taxes. In this session, we will share specific examples of strategies including: alternatives to a 1031 exchange, corporate charitable strategies for transition and tax efficiencies, and offsets for current year tax liabilities with future planned gifting approaches.

Enterprise Value and Financial Sufficiency

Business owners who are counting on their companies being key components of their retirement income need to ask two questions. First, "How much will be enough to be financially sufficient for the rest of my life?" and second, "How do I make sure my business has enough enterprise value?" Starting to plan early and making changes all along the way provide far more options and higher likelihood of success than scrambling as retirement nears.

Unlocking Peak Performance through Fiscal Analytics

What if you and your team could fully leverage your financial statements to clearly see how to increase profit, cash, debt capacity, and enterprise value? Among the most powerful tools in every business are their basic financial statements. Most businesses use their Income Statement or P&Ls to match revenues and expenses to profitability, and many may use the Balance Sheet to determine the company's short and long-term financial strength. But fewer business owners extract the data from these reports and distill actionable next steps to quickly impact their organization's performance.

This workshop helps you turn financial analytics into actionable insights through key concepts, including:

- Income Statement analysis: identifying and accessing unclaimed profit;
- Balance Sheet analysis: improving cash flow;
- Forecasting: exploring how small improvements can significantly impact financial performance;
- Business Valuation: how shaping the qualitative and quantitative components can increase your overall value; and
- Taking action to facilitate change and monetize your financial analytics.

The session will highlight data from real companies to help you apply the concepts to your own business. Through comparisons to your company's best past performance and industry benchmarks, financial analytics can provide clarity and direction to enable you to make more confident decisions. Join us to learn how to quickly spot the areas that have the greatest opportunity for improvement and unlock the financial performance of your organization.

The Seven Fundamental Cash Drivers

Arm your company to aim at what financially matters most for the business's financial future. In this session, we will cover the cash drivers that directly impact profits and enterprise value.

We will teach:

- The Seven Fundamental Cash Drivers
- How to pinpoint business issues and provide actionable insights for your members
- How understanding key cash drivers can impact company performance this year, next year, and beyond

We'll share actionable strategies you can take and use immediately with your groups.

Financial Sufficiency for Executives

Executives and professionals who are counting on their career earnings as the key component of their retirement income need to ask two questions. First, "How much will be enough to be financially sufficient for the rest of my life?" and second, "How do I create a plan of action to achieve that?" Starting to plan early and making changes all along the way will provide far more options and higher likelihood of success than scrambling as retirement nears.

Thinking Like the Owner: Financial Strategies for Becoming Invaluable in Your Organization

As a key person in the company, perhaps you are looking to be considered for partner/owner someday, or for advancing your role, responsibilities, and income over time. "Thinking Like the Owner" produces mindsets and strategies that are aimed at increasing returns on all the key capital structures of the business, increasing enterprise value, innovating marginal utilities, and creating opportunities for you to take new territory and step in and lead. This session shares economic and financial distinctions, principles, and practices that allow professionals to take their careers in the company to another level by thinking like the owner.

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