

OUR APPROACH

Level Four Business Solutions is a multi-disciplinary platform with a proven process to provide high-quality advice to businesses. We work with the business owner to define the current state of their business, pinpoint what they value most, and envision their eventual exit. We then deliver a plan for the business at every stage of the owner's life to identify, protect, harvest, and manage the value they've created.

WHAT MAKES US DIFFERENT

The team is made up of experts in varying fields and together represent a truly vast knowledge base. We work with the other divisions of Level Four as well as the other portfolio companies of Carr, Riggs, and Ingram to provide a uniquely holistic approach to our planning process. We understand the obstacles you encounter through your business life cycle and take steps to maximize your business and its value.



BUSINESS SOLUTIONS INCLUDE:

- Tax Planning
- Exit Planning
- Employee Retention
- Asset & Risk Management
- Executive Benefits
- Retirement Plan Consulting
- Buy-Sell Consulting

ONGOING SUPPORT

After an introductory meeting for Business Solutions services, there may be one or several meetings to dial in the optimal plan before finalizing. Typically, we will deliver a report on our analysis of the current scenario including suggested steps moving forward, provide guidance during implementation, and develop a meeting schedule for maintenance. (Certain strategies may dictate regularly scheduled meetings while other meetings are based on events.)

Examples of regularly scheduled meetings:

- Year-end tax planning
- Annual estate planning
- Life insurance policy reviews

Examples of meetings based on events:

- Business plan adjustments upon a merger or acquisition
- Meeting before a significant liquidity event
- Meeting upon significant changes in tax law

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