



Succession & Transition Planning

- **The Challenge:** Your firm faces a generational transition, but you lack a clear, fair, and financially sustainable plan for partner retirement and ownership transfer.
- **Our Approach:** We guide your firm through the complex challenges of transition, facilitating a structured process to develop a fair valuation methodology and a sustainable buyout structure.
- **Key Deliverables:** A Valuation & Goodwill Analysis, a Draft Transition Plan, and a Business Terms Summary for your legal counsel to use in amending governing documents.