



# GAMBIN FINANCIAL GROUP

## Foundational Business Planning

### Services Offered:

#### Risk Management

- Risk audit & analysis
- Insurance audit
- Executive Summary w/ Objectives
- Liquidity Planning
- Financial Position Review
- Insurance plan

#### Key Objectives & Growth Planning

- Qualitative & Quantitative Goal Planning
- Board of Advisors
- Goal Planning
- Written Road Map w/ Action Plans

#### Legacy Planning

- Estate Planning

#### Fee for Service

- \$\_\_\_\_\_

## Established Business Planning

### Services Offered:

#### All Foundational Planning work, plus:

#### Risk Management

- Entity Structure
- Buy/Sell Plan
- Cash Flow Analysis
- Key Info & Legal Audit w/ Access to Legal Experts

#### Tax Planning

- Adjusted Gross Income Tax Strategies
- Income tax Audit w/ Tax Planning
- Access to Tax Experts

#### Key Objectives & Growth Planning

- Cash, Capital & Debt Management
- Probability Analysis w/ Goal Adjustments
- Tax & Risk Diversification
- Business Transition Planning
- Key Employee Retention & Comp Strategies

#### Exit Strategy Plan

- Written Exit Strategy

#### Legacy Planning

- Lifetime Income Plan
- Identity Protection Plan
- Health Insurance Cost Strategies

#### Fee for Service

- \$\_\_\_\_\_

## Complex Business & Exit Planning

### Services Offered:

#### All Established Planning Work, Plus:

#### Risk Management

- Continuation Planning
- Access to Advanced Planning Specialists

#### Tax Planning

- Cost Basis Planning
- Business Transfer of Value Tax Strategy
- Tax Mitigation Strategies

#### Key Objectives & Growth Planning

- Board of Advisors Creation
- Business Valuation
- Liquidity & Bonding Strategies
- Social Security Maximization
- Employee Stock Option Plans
- Deferred Compensation Plans
- Capital & Debt Management
- Benefits Package Audit Rank & File and C Level

#### Exit Strategy Plan

- Succession Plan
- Valuation Strategies

#### Legacy Planning

- Charitable Gift Planning
- Estate Transition Planning

#### Fee for Service

- \$\_\_\_\_\_