GALLIARD FAMILY BUSINESS ADVISOR INSTITUTE

Did you know that?

- 95% of all businesses in the U.S. are family-owned or closely held.
- Within the next 5 years, 55+% of family business owners expect to transition out of their business.
- Fewer than 40% of businesses successfully transition to the next generation of management.

Schedule your Family Business Assessment today!

Galliard Certified Family Business Transition Advisors are passionate about making a difference by providing family businesses with the **information and services they need**, in a **cost-effective manner**, to **thrive today and successfully transition tomorrow**.

"I think it was a good idea to start with the assessment. That gave me recommendations about all of the areas of the business. It touched on all of the things that I should be thinking about. The assessment helped tailor the process to my company and issues specific to me."

Daniel Ostrander, CEO B&D Rollers

Family Business Assessment

The **Family Business Assessment** provides family business owners with a practical roadmap in key areas of their business to successfully transition to the next generation of management and ownership. Carefully crafted, easy-to-read, practical reports are generated for both the Client and the Advisor, and cover **six key areas**:

1. Strategic Planning
2. Financial Management
3. Workforce Management
4. Family Governance
5. Succession Planning
6. Professional Advisors

The Client Report you receive is complete with accurate, personal observations about the client's company, suggestions for improvement, ideas for consideration, and resources for on-going education and support. The report provides high value for a minimal investment.

Your Advisor will use the results of this report to help you move towards achieving your business and transition objectives.

This web-based assessment takes less than an hour to complete. It is user-friendly, cost-effective, and value packed.

Need help to focus?
On your business…
On your family…
On your legacy?

Ask about the Family Business Assessment and how this comprehensive report can assist you.