

Concord
Wealth Management



Building A Winning Culture

- ✓ Vision – Think BIG!
- ✓ Transparency
- ✓ Clear Expectations
- ✓ Inspect what you Expect
- ✓ Collaboration
- ✓ Differentiation
- ✓ Career Growth Opportunities
- ✓ Fun!



Building A Winning Culture

- ✓ Key Person Planning
- ✓ Buy-Sell Agreements
- ✓ Employee Incentives and Benefits
- ✓ What is your business worth?
- ✓ Succession Planning
- ✓ Leveraging Your Business For Retirement
- ✓ Tax Advantages of Owning a Business
- ✓ Financial Position of the Owners and Managers

Thank You!

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