



Business Owner Advisory Services

You are proud of the successful business you've built and it's time to look toward what's next. Let us help you prepare.

At HUB, we help owners of privately held and family-owned companies navigate the ever-changing landscape of business today. We understand the challenges you face, and are prepared to guide you through the next phase of your business and personal planning.

Whether that involves scaling-up, or establishing a succession plan, we are prepared to ask the critical questions to help plan for what lies ahead.

The Scary Truth

50% Business transitions in the US that are involuntary

75% Business owners regret selling after one year

94% Haven't written a plan for their next chapter

Source: Exit Planning Institute

How Our Business Advisory Team Can Help

- Financial Planning
- Wealth Gap Assessment
- Keep or Sell Planning
- Estate Plan Review
- Emergency Management Planning
- Business Agreement Review
- Investment & Insurance Review
- Philanthropic Planning
- Employee Incentive Planning
- HR Consulting*
 - Payroll & Benefits*
- Property & Casualty Insurance*



Ready to get started?

Scan the code & complete the form. We will get in touch soon to schedule a one-on-one conversation.

We look forward to learning more about your business and your vision for your future!

4-Steps to Prepare for a Business Transition



Too often, business owners wait until circumstances force them to make a decision. By preparing early, you maintain control of your options, protect the value you've built, and give yourself time to transition on your terms. A well-thought-out plan ensures you're ready no matter what the future brings.

1 Start and End with a Vision
Identify your goals for today and tomorrow.

	Want to Now <small>(Example: Current Role, Cash)</small>	Want to Later <small>(Example: Second Time, Business Transition)</small>
What to	Goal Name: _____ Goal Amount/Frequency: _____ Time Horizon: _____	Goal Name: _____ Goal Amount/Frequency: _____ Time Horizon: _____
Priority		
How to	Have to Now <small>(Example: Current Project, Current Situation)</small>	Have to Later <small>(Example: Major Goals, Transition)</small>
	Goal Name: _____ Goal Amount/Frequency: _____ Time Horizon: _____	Goal Name: _____ Goal Amount/Frequency: _____ Time Horizon: _____
	Now	Later
	Timeframe	

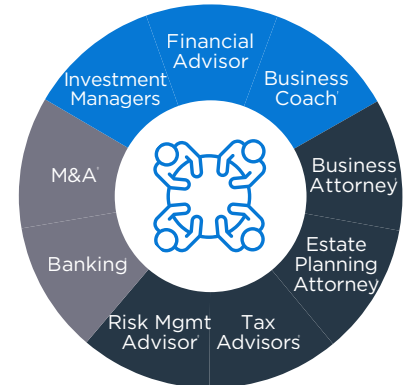
2 Prepare a Financial Blueprint
What does a Financial Blueprint look like?

- Next Chapter Planning
- Wealth Gap Analysis
- Profit Planning
- Estate Value Projections & Planning
- Emergency Management Plan

3 Obtain a Business Fair Market Value
Have you valued your business?

- Wealth Gap
- Value Gap
- Identify the universe of buyers
- Understanding the buyer's perspective

4 Build Your Advisory Team
Who is on your team?



*Services offered by affiliates.

Our Planning Process

Every successful transition begins with structure. By breaking down a complex process into manageable steps, you'll have the clarity and confidence to move forward. Our framework ensures that you're not just reacting to change, but actively shaping the future of your business.



Following this process can help create a clear roadmap for what comes next—whether that's scaling for growth, passing the business to family, or preparing for a sale. With HUB by your side, you'll have the guidance and resources to turn your vision into reality while protecting the legacy you've built.



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