



## Roadmap to Financial Independence™

### Pre-Game Planning Program

A 3-phase planning program offered by the M & A Quarterback gives business owners a vivid picture of where they are, where they are headed, and how to get there.

#### Phase 1 Real World Business Valuation

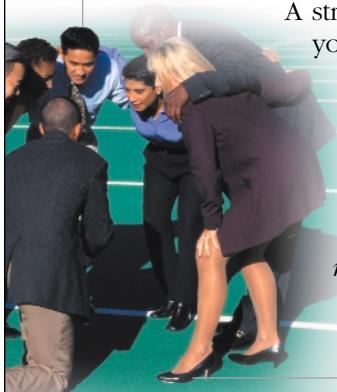
A realistic evaluation of your business “through the eyes of a buyer” to help you answer the question: *Where am I today?*

#### Phase 2 Roadmap to Financial Independence

A comprehensive analysis of your current and future financial resources and anticipated needs to help you answer the question: *How far am I from financial independence?*

#### Phase 3: Business Value Builder Program

A strategic analysis of your business “through the eyes of a buyer” to help you answer the question: *How can I improve my business to reach my target value?*



**M&A Quarterback** is a program designed to help business owners coordinate all the financial, legal and marketing aspects of selling a business:

Pre-sale planning

Valuation

Tax planning

Marketing and finding the buyer

Negotiating and closing the sale



David Bishop

The M & A Quarterback program was created by David Bishop in cooperation with Bishop & Company, *Investment Bankers and Mergers and Acquisitions Advisors*, and Bishop, Capitano & Abner, *Attorneys at Law*. All legal services are provided by Bishop, Capitano & Abner.

For more information on the the Pre-Game Planning Program or any other services offered by the M & A Quarterback call us at 704-442-8875 or visit us at [www.bishop-company.com](http://www.bishop-company.com).



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## Roadmap to Financial Independence™ (for Business Owners)

Coordinating all the financial, legal, & marketing aspects of your Mergers and Acquisitions game plan

## The Purpose

Do you ever wonder how much you need to get from the sale of your business to be financially independent (whenever you choose to sell)? Bishop & Company's Roadmap to Financial Independence™ gives you a true picture of what you need from the sale to be able to live without the business, or perhaps without even working altogether, if you so choose.

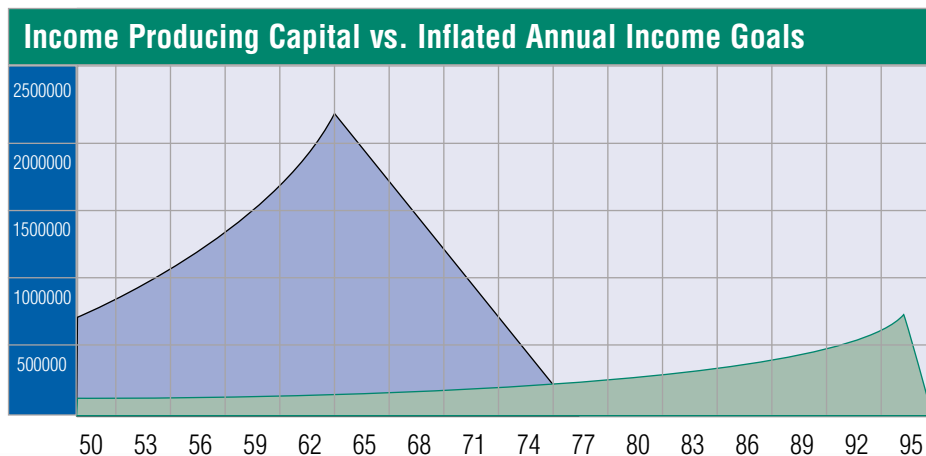
## Why Now?

Whether you're considering a sale in the immediate future or 10 years from now, you should know what it will take to be financially independent. It's pretty hard to get somewhere without knowing where you are headed. If you're counting on the sale of your business to help you get there, Roadmap to Financial Independence™ will give you a target value to shoot for so that you can develop a workable plan to achieve financial independence.

## What's Involved?

Roadmap to Financial Independence™ determines the asset base you will need to accumulate to produce the income you deem sufficient to meet your needs when you are no longer working. You decide when you want to be financially independent and what you need to live comfortably. All your assets, income sources and expected expenses will be considered, including social security and taxes. With a Real World Business Valuation™ you will also understand the value of your business and how it fits into the financial independence equation. If there is a deficiency in your expected asset base, we will determine how much your business will have to increase in value (*Target Business Value*) for you to retire when you desire. Our sophisticated interactive model enables us to determine if and when you will be financial independent and what corrective actions should be taken today to

help you achieve your goals. We will not disclose any of your financial information to anyone – not even your name or the fact that you are interested in one day being financially independent.



### Age of First Client to Retire

- Combined Annual Income Goal (after tax & inflated)
- End of Year Balance of Capital

## What You Will Get

You will receive a Roadmap to Financial Independence™ in which we analyze your current ability to achieve your financial independence goals. The focus of this report is on the financial independence shortfall or "gap" and how that gap can be eliminated by increasing the value of your business to achieve the *Target Business Value*. The report should be an eye opener, which will help you to stop procrastinating about improving your business. With a clearly defined roadmap you will be energized to start taking the action necessary for you to enjoy a complete and satisfying retirement.

## What's So Important About a Roadmap to Financial Independence™?

A Roadmap to Financial Independence™ will help you:

Understand how prepared or unprepared you are for financial independence

Appreciate how your security and comfort in retirement is tied to the future value of your business.

Stop procrastinating and commit your company and yourself to a plan to achieve financial independence.

