### **Exit Planning**

# **Business Owner Summary**

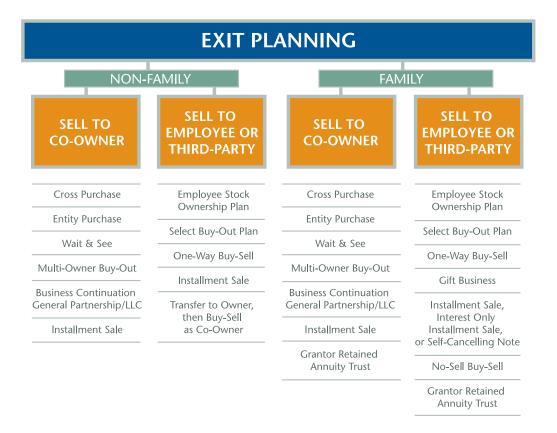


# Will your business continue when you or a co-owner leave?

Consider how your business might change in the event of a death, disability, divorce, dissolution or departure. Planning for these events is critical to ensuring the future success of your business.

#### To whom will you transfer or sell your business?

Exit Planning considerations many times start with determining your successor.



## Build a solid platform

#### Do you have an existing buy-sell agreement?

If so, any significant changes which have taken place since the agreement was drafted may impact its effectiveness today.

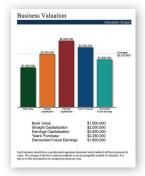
A **FREE Buy-Sell Review**, from the Principal Financial Group® can help ensure your plan is on track, providing you with valuable information including an informal **Business Valuation** and answers to key questions.

#### Don't yet have an agreement?

Now may be a good time to put an exit strategy in place. An informal **Business Valuation** and **Business Continuation Proposal** provided *at no cost to you* by the Principal Financial Group® can help you define an exit strategy and identify potential funding considerations.



**BUY-SELL REVIEW** – Includes highlights of your existing buy-sell agreement and our recommendations based on your current business needs. Your review also includes a summary of your current funding and options to help meet your business needs.



INFORMAL BUSINESS VALUATION AND BUSINESS
CONTINUATION PROPOSALS – We provide a free Informal
Business Valuation using five of the most commonly used
valuation methods, as well as a proposal that outlines one or
more suggested business continuation solutions based on your
business needs and your identified successor.

#### FOR MORE INFORMATION

Contact your local financial representative



#### WE'LL GIVE YOU AN EDGE®

#### Principal Life Insurance Company, Des Moines, Iowa 50392-0001, www.principal.com

Although a Buy-Sell Review from The Principal® provides a valuable starting point, it does not provide you with a legal opinion as to the legal or tax implications of your agreement or to the appropriateness of any funding strategies. The Principal cannot provide you with any legal document or revise existing legal documents. The valuation will not be a substitute for a formal valuation nor does it establish a value for tax purposes. The review is intended to help identify your objectives for the buy-sell agreement and issues that must be addressed to help ensure your objectives are being met.

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