SYM FINANCIAL ADVISORS

As a business owner, you wear many hats. Ours is one hat you don't have to wear.

Running a business comes with unique financial challenges—we get it.

With over 55 years of experience, we're here to bring clarity and strategy so **you can remain focused on what you've built.**

sym.com | 800.888.7968

4 Top Areas We Review

FOR BUSINESS OWNERS

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01
Structure & Strategy

- Ownership & Valuation
- Operating Provisions- LLC or Partnership?
- Buy-Sell Agreement
- Articles of Incorporation
- Non-disclosure Agreements
- Real Estate Holdings

02
Succession Planning

- Emergency Contingency Plans
- Proactive Exit Plan
- Voting vs. Non-voting Shares
- Asset Sale vs. Stock Sale
- Private Equity Buyout
- Charitable Desires

03
Retirement Planning

- 401(k)
- Simple IRA or SEP IRA
- Solo 401(k)
- Cash Balance Plan/ Defined Benefit Plan
- IRA or Roth IRA Strategy

04
Tax Planning

- Collaboration with your CPA
- Wages & Distribution planning
- Reinvestments into company
- Accounting Methods
- Tax Credits

SYM Fiduciary Pledge to You

1. Maintain strict confidentiality.
2. Prioritize clients' interests above all else.
3. No sales commissions; full fee transparency.
4. Remain independent from banks, brokers, insurance companies, and custodians.

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