



Identifying Value Gap\$

# Today's Presenter

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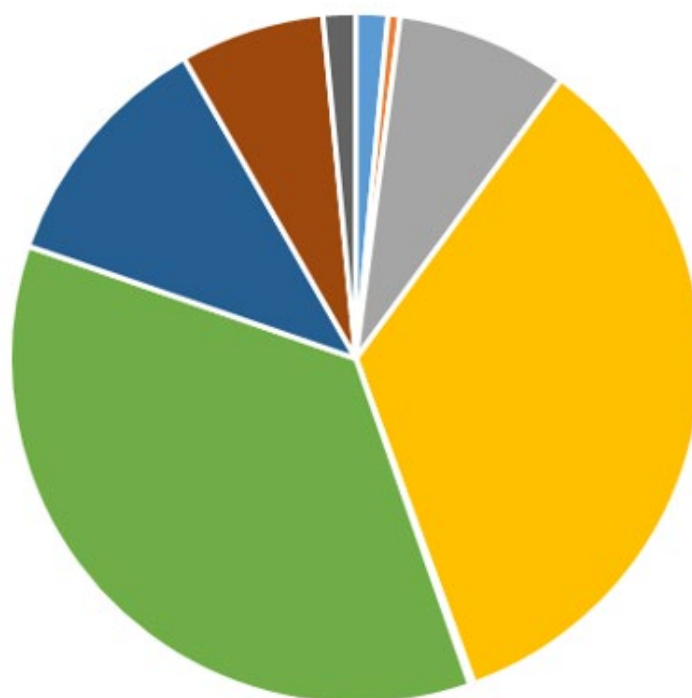
Certified Family Business Specialist  
26 years of Financial Services Experience  
President and Founder of Triumph Wealth Management, LLC



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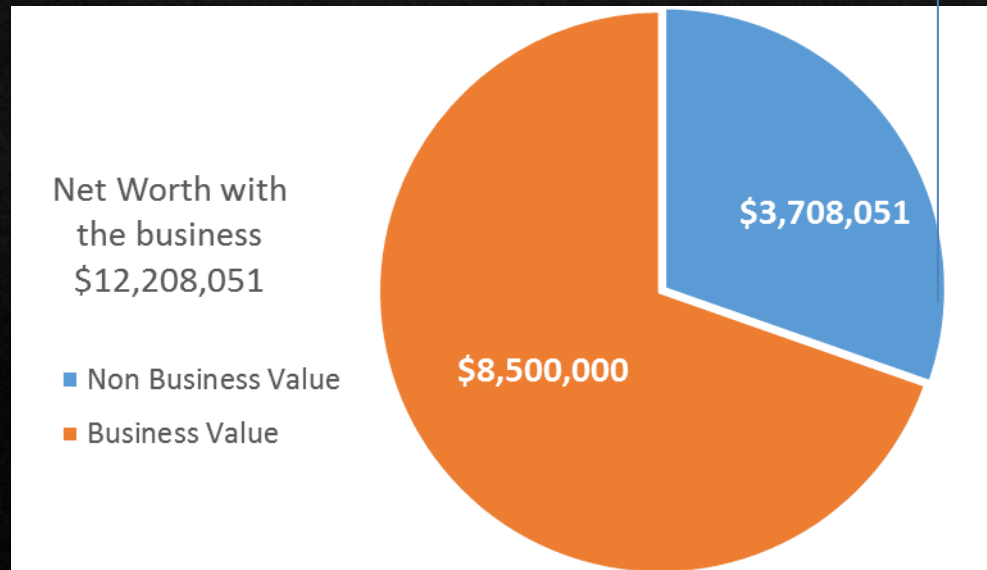
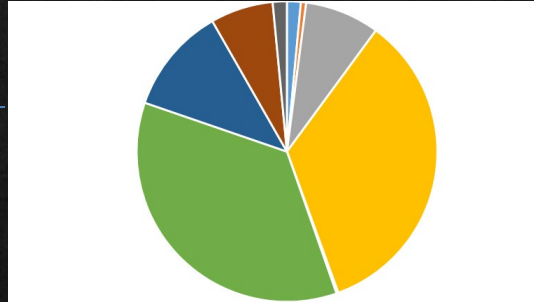
# Why Value?



Net Worth  
without Business:  
\$3,708,051

- Cash and Checking
- Life Insurance Cash Values
- Bonds and Stocks
- Real Estate
- Limited Partnerships
- Retirement Plans
- Residence(s)
- Personal Property
- Other

# Why Value?



This Business is 70% of the Owner's Net Worth

....assuming he/she can monetize

# Determining Value Gap

## Buckley Dealerships Discover Report

Name: **Buck Buckley**  
Industry: **Transportation and Warehousing**  
Objective: **Sustainable Growth**  
Completed: **Jan 15, 2021 11:02 AM**

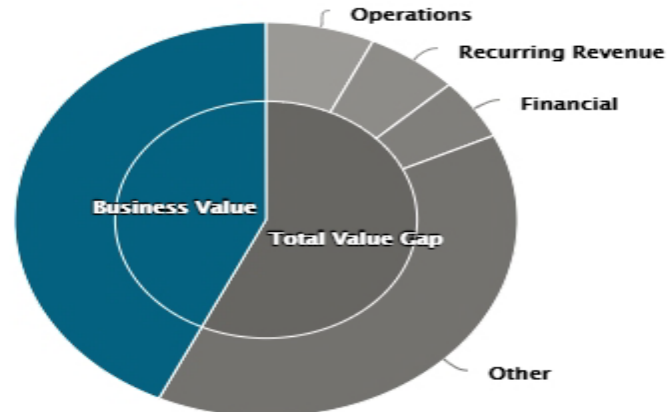
Enterprise Value: **\$13.2M**

Potential Business Value: **\$27.7M**

Value Gap: **\$10.2M - \$18.9M**

### Growth and Value Opportunity

Buckley Dealerships





# Determining Value Gap

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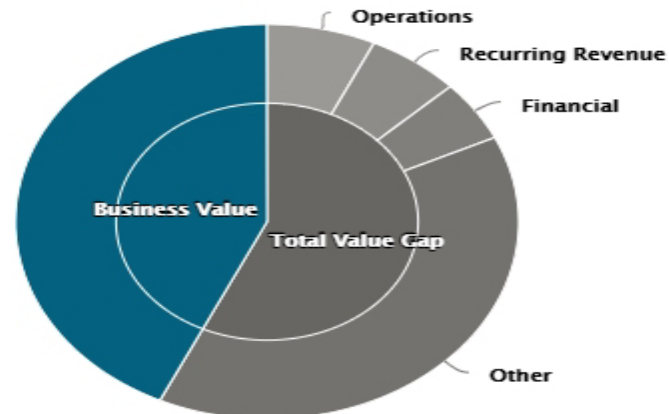
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### Growth and Value Opportunity

Buckley Dealerships



# Master Planning as a Business Owner

## 3 Legs of the Stool

- Personal Financial Planning
- Maximize Business Value
- Life After Business Planning



# Identifying Value Gap\$



## Personal Finances

Do I have enough?  
Where will my income come from?  
What about taxes?



## Business Value

What is it worth?  
How can I maximize value?  
Is it transferrable and to who?



## What's Next

Who will I be?  
What will I do?  
Am I ready?

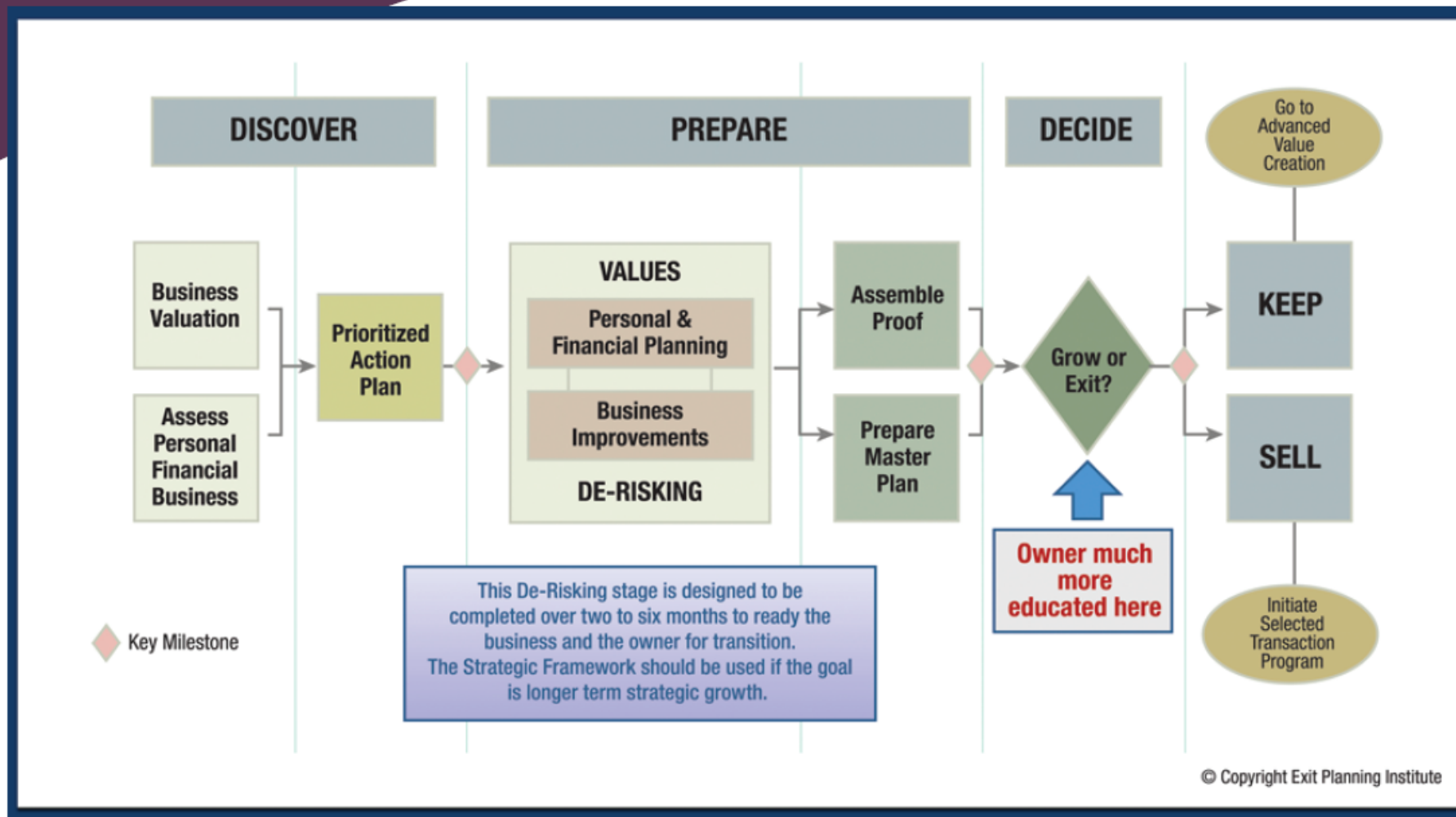


# Value is all about Transferability.

**“Focusing on Value produces all other positive outcomes.”**

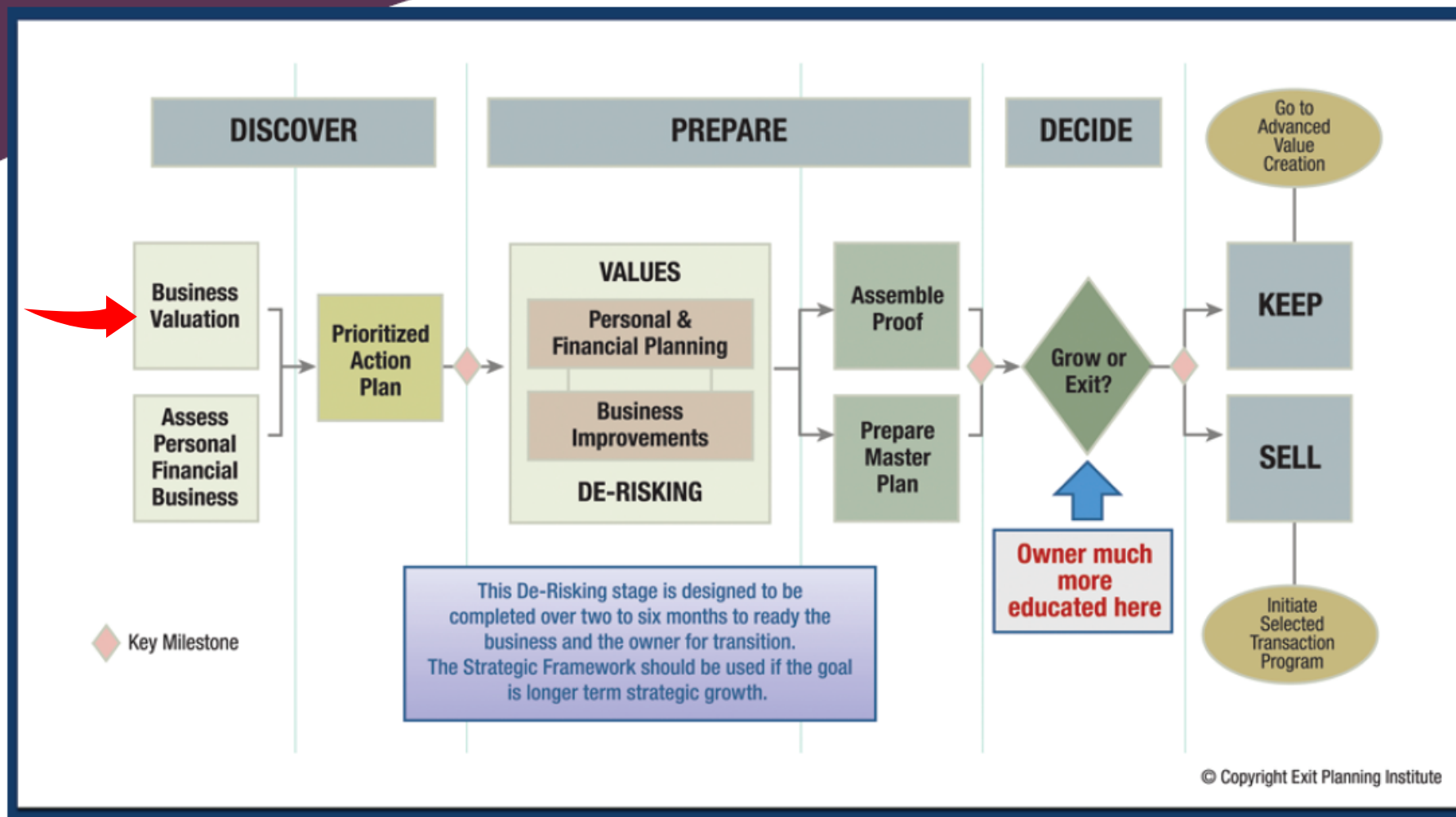
-Christopher Snider, Walking To Destiny: 11 Actions An Owner Must Take To Rapidly Grow & Unlock Wealth

## Value Acceleration Model

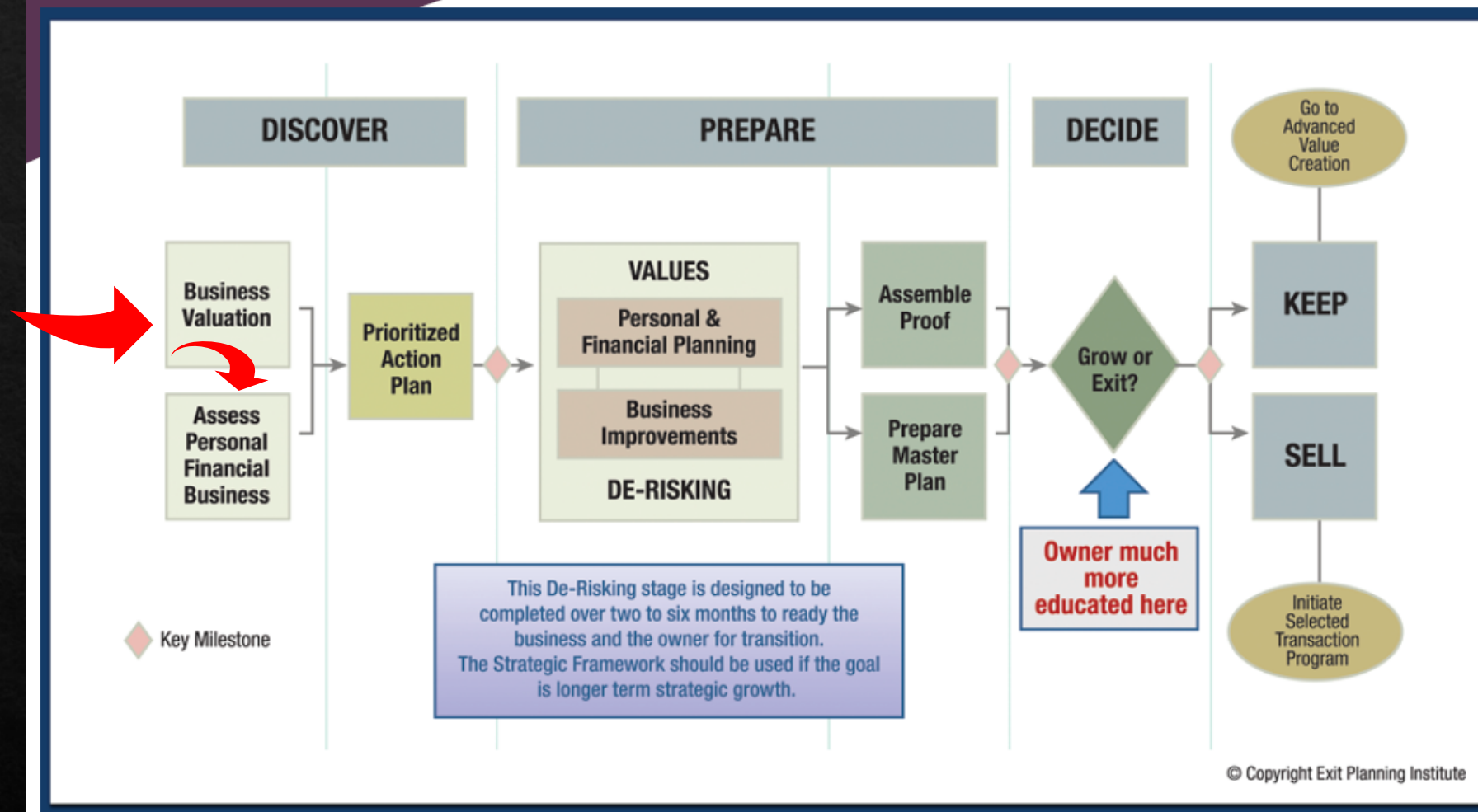




## Value Acceleration Model



## Value Acceleration Model





# 5 Stages of Value Maturity

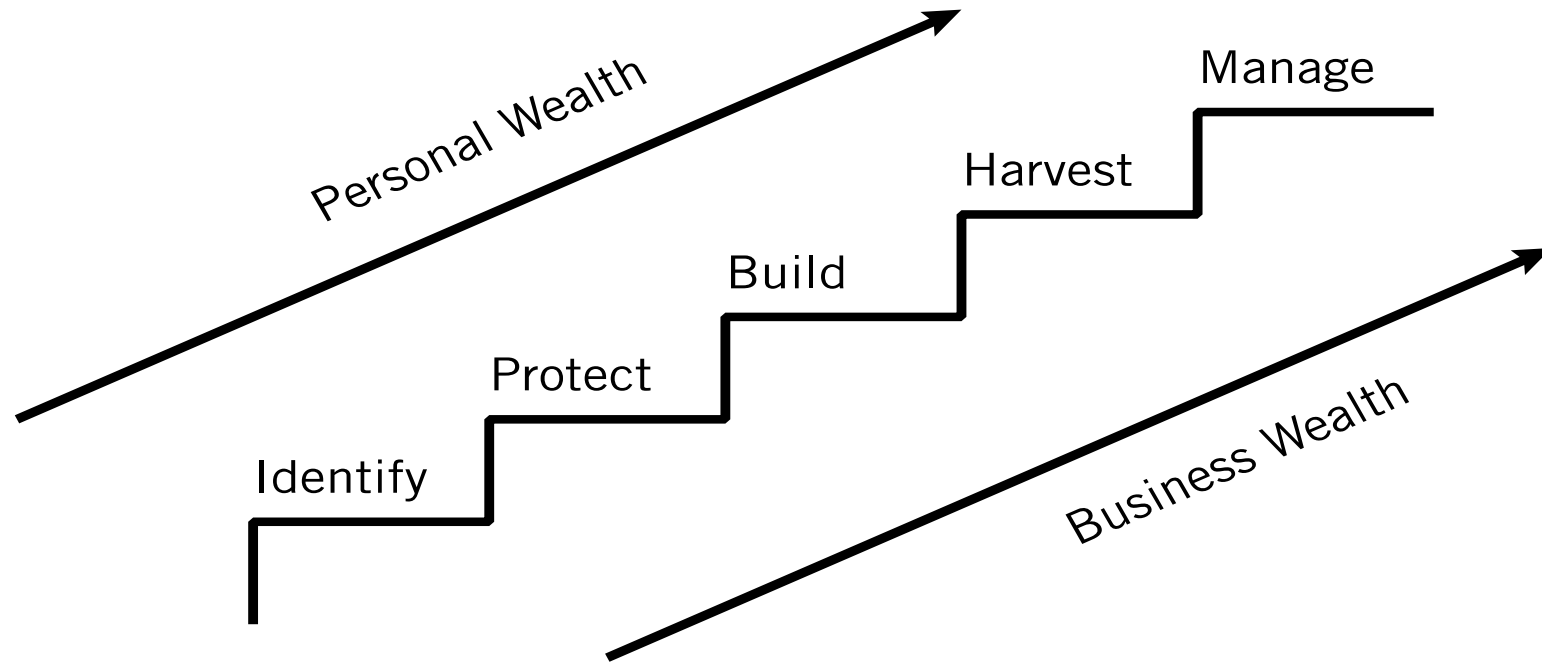


Exhibit J: The Five Stages of Value Maturity

# Ready for a Value Gap Report?

◆ **Contact Nathan Brinkman at  
Nathan@triumphwealth.com**





Complimentary  
Ready for a Value Gap Report?

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[nathan@triumphwealth.com](mailto:nathan@triumphwealth.com)**

