

About Our Wealth Preservation Program

Working in tandem with DB Machinery Inc., Prism provides the crucial expertise required to help a business choose the right path for the future. DB Machinery's years of industry experience and extensive contacts in machinery and equipment position them as respected experts. They are trusted members of the Prism team that can help reposition a business or, if need dictates, oversee its liquidation.

Here's how we can help -

- Succession Planning
- Business Valuation
- Equipment / Inventory Valuation
- Equipment Sales
- Real Estate Issues
- Raising Financing
- Business Repositioning or Dissolution
- Auction Services When Necessary

If the future of your business doesn't seem as clear as it did a decade ago, call us. We can help.

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Balancing Business. Mentoring Change.

Wealth Preservation





Wealth Preservation

Even well-established owner-managed manufacturing businesses need a reality check now and then – especially those that have been passed down through generations. Whether it's the wake-up call of a changing business environment, time to hand over the reins of management, or the realization that overall wealth isn't what it was, it's important to take pay heed while it still counts.

At Prism, we know owner-managed and family businesses intimately. We understand the obstacles they face and the special factors that impact their operations every day. We're specialists with years of hands-on manufacturing experience who deliver knowledge, expertise and common sense solutions to the clients we work with.

Protection

And, we know the eight indicators of a business at risk.

- Overextended with little cash on hand
- Loss of focus on the core product or service
- Inventory levels that climb faster than sales, with more inventory than sales warrant
- Highly leveraged and thinly capitalized. The bank has more at stake in the business than its owners
- Dependent on one person
- Sales growth, but no growth in net income
- Children in the business who assume they can manage, just because they own it
- A confused sense of direction with no consistent strategy for the business - succession planning, training, new technologies and skills acquisition.

Issues like these don't just create obstacles; they can put a business on the brink.

Prism's Wealth Preservation Program delivers practical solutions in ways that are easy to see and simple to understand. We undertake a three-phase program that begins with a thorough assessment of all areas of the business including things like your property, plant and equipment. Then, with your unique requirements in mind, we design a plan that will position you and your business for the future – whether it be fine-tuning, a well structured retirement for you and your loved ones or a business transition to new ownership. Then, with a plan for the future in place, we undertake implementation with plenty of guidance, assistance and direction along the way.

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