



BLUEPRINTS
FOR TOMORROW

Series of Blueprints designed to help you eliminate the "what-ifs" that keep you awake staring at the ceiling at 2 o'clock in the morning

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"Business owners, who lie in bed at night worrying about the 'what-ifs', need to develop blueprints for their life," says Martin Levy .

"Most business owners haven't protected themselves or planned for the future because they're so busy working in their business," Levy says. "They are caught up in their day-to-day concerns and haven't spent any time creating blueprints for their future. So they lie awake at night worrying. I call this The Working- In-Your Business Trap."

"When you fall into this trap, you don't take the time to protect yourself from the many dangers of operating a business in a volatile business climate. You don't plan what will happen if you become disabled or die. You don't create a plan for getting your money out of your business, or selling it. You don't protect yourself from getting sued, or from a downturn in the economy."

"In addition, without a blueprint for the future, you don't figure out how to keep key employees from leaving, how to take more time off from work, or how to retire. As a result, you continue to be the key person in your company, the rainmaker forever stuck in your business. Without you, the entire business would fall apart."

"By working solely in your business, you leave yourself vulnerable and exposed to a lot of risks. You are also unclear about your future. As a result, you end up lying in bed at night worrying about the 'what-ifs.' What if I become disabled? What if I die? What if I get sued? What if the economy slows down?"

"That's why we use The Blueprints For Tomorrow™ Program," Levy says. "It's a series of blueprints that help you create strategies to deal with the 'what-ifs', the kind of things that keep you awake at night



staring at the bedroom ceiling at 2 o'clock in the morning."

"We are a firm that specializes in this kind of work," Levy says. "As a result, we have developed innovative strategies to address the unique issues faced by business owners operating in a volatile business climate. We have learned that most business owners, even the most successful, could be only 90 days from bankruptcy."

"That's why it's so important to take a little time away from working in your business, to work on these blueprints and protect yourself, your family, and your company."

Levy explains that the unique structure of his program is designed to ensure that these 'what-if' issues get dealt with quickly and comprehensively.

"Each blueprint deals with a very specific issue. During focused planning sessions, we address one specific issue at a time. There is no wasted time or activity. We do what is required to get the job done, and also act as a coach to help make sure you do what you need to do. This approach keeps everyone accountable."

There are 14 different blueprints, each one dealing with a specific issue. There are blueprints for:

- *Sale of business;*
- *Inside transition;*
- *Passive ownership;*
- *Premature death;*
- *Disability;*
- *Retirement;*
- *Wealth accumulation and asset protection;*
- *Key employee retention;*
- *Legacy planning;*
- *Orderly estate distribution; and*
- *Prevention of misspent life insurance dollars.*
- *Can Do Minimizer*
- *Corporate Benefits and Retirement*
- *Qualified Plans*

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"We have developed specific strategies and a step-by-step process, for each of these issues," Levy says. "For key employee retention, for example, we help you assess the financial impact of losing a key person, and put in place strategies to keep that individual from leaving. This blueprint helps lower turnover, and keeps your business operating at peak performance."

"If you are interested in ultimately selling your business, we help you develop a plan to totally systemize your company so you are no longer the rainmaker. We help you lock in key management and put the business into growth mode. Then we assist in attracting several potential buyers so you will receive the maximum amount of cash from the sale. This blueprint gives you greater control over your future, and works to give you the opportunity to do what you have always wanted to do."

Levy gives three examples of clients who have greatly benefited from The Blueprints For Tomorrow™ Program.

"We work with an engineering firm that has been totally transformed by the process," Levy says. "When we started, the principles of the company were completely hands-on. They had no succession plan, or plan to keep key people. Their buy-sell agreement was not funded, and many other important financial issues were not dealt with."

"After working through the blueprints, the business owners have a greater sense of well being and clarity about the future. We helped put their business into growth mode, and locked in key people. We also helped to implement plans that made the company more attractive to an outside buyer. These blueprints have helped the principals to work less, and have also increased the value of their company because they are no longer the indispensable rainmakers."

"We worked with the owner of a construction company who is very grateful that we developed blueprints for him a few years ago. Since that time, his partner became sick, then disabled, and ultimately died. Because he had the blueprints in place, our client was able to make an internal transition to three key employees and sell his stock in the company. He is now able to play golf and spend time with his grandchildren, while his company did not miss a beat during the transition."

"We also worked with a business owner who was plagued by high turnover in his company. Even though he had a bonus plan, key people were constantly going over to the competitors

"After working through the blueprints, the business owners have greater peace of mind and clarity about the future."



By working through our blueprints, we developed a very specific bonus plan that gave key employees an incentive to stick around. Now they are locked in, and turnover is virtually non-existent. He no longer lies in bed worrying, "what-if" a key employee leaves."

From our experience, Levy says we have seen many business owners experience unnecessary hardship because they haven't done this kind of planning.

"It is really unfortunate. Many business owners think they are invulnerable. They are riding high, and then life happens. They get sick, a key employee leaves, or they get sued. Suddenly

they are in trouble. They sometimes lose everything that they have worked so hard to create. But if they had planned ahead, and developed a blueprint, they would be okay."

Levy says that The Blueprints For Tomorrow™ Program not only helps to protect you, it also gives you the opportunity to help maximize the financial potential of your business.

"If you lock in key employees and increase the value of your business, you have a greater chance to maximize the cash you will ultimately receive from the sale of your company. You will also operate a more profitable business in the meantime because your operation runs more smoothly and consistently."

"As well, if you have put in place a blueprint for wealth accumulation, you will have better financial opportunities in the future. You will be making sure that you are reaping the full financial rewards from all of your hard work."

A sense of well being, increased clarity, and greater confidence are also important by-products of the program, Levy says.

"By dealing with these issues head-on, and having these blueprints in place, you know you have done the planning to protect yourself and maximize your opportunities for the future. You can sleep better at night, and wake up refreshed. This added energy can only improve your business and your life."

Levy emphasizes that The Blueprints For Tomorrow™ Program is not for everyone. "You have to be mature, experienced, and professional. You have to have strong business acumen, and be willing to invest to better your business. You also have to be open-minded and future-oriented. You need to be trusting, caring, and concerned about the future of your family and employees. If you have these qualities, you will most likely benefit greatly from this program."

To get started with The Blueprints For Tomorrow™ Program, you participate in a free one-on-one Starter Session. During this session, we will help you assess your most important issues, and get clear about your goals. Then we will discuss which blueprints are required for your situation.

As a member of the program, you then work through the required blueprints during a series of strategic

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coaching sessions. "These sessions are very hands-on and interactive. We determine together what needs to get done, and by whom. If you have an existing advisor who can help, we bring them onto the team, and if you require additional advisors we can recommend professionals from our network."

"This process is extremely efficient, and requires the minimum amount of time possible from you. In this way, you know that your issues are being addressed, while you are able to focus on running your business."

"We also make sure that everyone is accountable. We hold review sessions regularly to update the blueprints and make sure everyone is doing what they committed to. As a result, you are confident there are no holes in your planning, and you have no uncertainties in your mind about your situation."

Levy concludes by emphasizing the importance of proactive planning for business owners. "If you plan ahead, you'll protect everything you have worked so hard to create, and open up your future to greater opportunities. With a little bit of time and effort, you will sleep soundly at night and have sweet dreams."

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*To book your free Starter Session, or to learn more about The Blueprints For Tomorrow™ Program, contact Blueprints For Tomorrow™ at **818-377-7260**.*