



Move Your Family Business Forward with Trusted Consulting

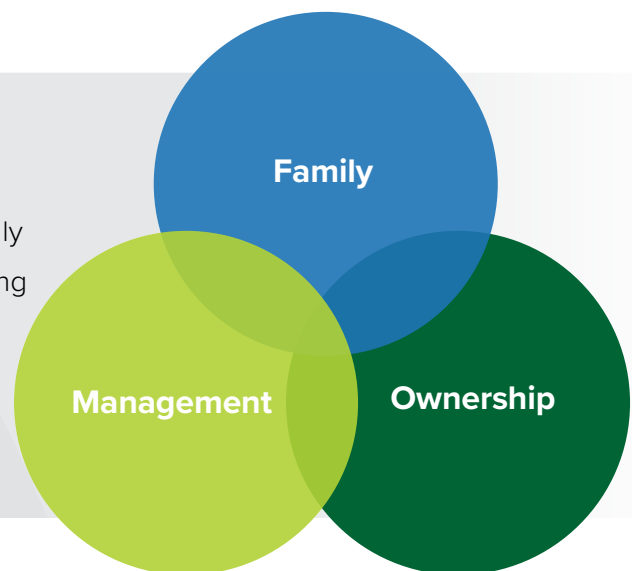
Charting a Clear Path Forward.

Family-owned businesses are the backbone of the economy, making up 87% of all American businesses. While any business comes with its unique trials, things can be especially challenging when you're working with family. It requires effective communication, clear boundaries, sound governance, a shared vision among family members and often times, an outside perspective.

As **trained facilitators with firsthand business experience**, Pinion's team of Family Business Advisors help ownership groups and families achieve effective management today, and plan business transitions for the future. We provide structure to the family planning process, bring examples and experiences from similar situations, and shepherd you through difficult conversations – charting a clear path forward.

Family Business Can Be Complex.

We help balance the overlapping components of family relationships within the demands of a business, offering peace of mind as you move forward together.



Business Planning and Facilitation: Creating Peace of Mind Through Uncertainties and Unknowns

While many circumstances are beyond your control, such as the weather or the markets, you can increase certainty by proactively developing succession, estate or strategic plans; by clarifying intentions and expectations; and by improving communication. We help families or ownership groups discuss and create an action plan for these topics and more:

- ▶ **Estate planning or family wealth distribution**
- ▶ **Communication between owners, family members or staff**
- ▶ **Current and potential future roles of business partners and/or family members**
- ▶ **Governance and decision-making processes, including advisory boards or formal boards of directors**
- ▶ **Ongoing education, training and development for management, family and/or staff**
- ▶ **Wholistic business strategic planning**
- ▶ **Philanthropic goals of the family and/or business**

How We Work

First, we will have a phone consultation to understand your goals for working with us and assess if we can be helpful. We typically propose a first phase project that engages all relevant members of your team. We will have individual conversations to hear each person's perspective and then a series of workshops to start addressing your priority topics.

Our workshops utilize tools customized to your situation, which could include skills assessments, behavioral profiles, or financial reviews. We don't have a one-size-fits-all template; rather we listen and adapt to find practical solutions for you. At the end of the first phase, we can propose more specifically the steps needed to sustain progress.

We often work in tandem with other Pinion team members or your professional advisors to execute accounting or legal solutions when those are relevant. We sometimes serve as the 'quarterback' of complex transactions to sustain progress, make sure all stakeholders have a voice in the process and truly understand the implications.

About Us

Pinion is a 'Top 100' accounting firm and national business consulting firm for food, agriculture, biofuels, manufacturing, and regional industries. With roots dating back to 1932, the firm has expanded upon traditional accounting services to deliver value and growth for clients through comprehensive policy-to-plate strategies and specialized advisory.

Pinion advisors are skilled in facilitation and conflict management and have the technical expertise to take care of your financial and tax needs. Whether you need wholistic strategic planning, tax consulting, or ongoing education and development for family or staff – we are dedicated to helping your family business thrive.

Pinion is dedicated to the people who entrust us with what matters most.