Carson Private Client: Helping Entrepreneurs Expand Their Time

You Can Live the Life You Want

You know where you stand. And you know the kind of life you want. The wealth decisions that separate the two are complicated.

To get from point A to point B, you need a trusted professional who is going to look at your situation holistically. Carson Private Client Services can help you prioritize what's most important.

Who We Work With

Business Owners » Executives » Entrepreneurs » Multigenerational Families

We help financial delegators and those who believe in a holistic approach expand their time to make the wealth decisions that will create the lifestyle they desire.

Our experienced team provides solutions in:

- Exit Planning
- Tax Planning and Minimization
- Trust and Estate Planning
- Direct Access to Private Markets
- Family Meetings
- Cash Management
- Philanthropy

Let's learn how one business owner engaged our team to navigate an exit plan and the next chapter of his and his family's life.

CEO Case Study

How Charlie the CEO Navigated the Next Chapter

Charlie is actively searching for an exit plan for his business, a multi-generational company founded by his parents. His sister Denise is involved, too. Both have children and spouses of their own. A business transaction would affect three generations as Charlie's and Denise's children would be benefactors of any newfound liquidity.

1 **The Challenge:** Competing and Demanding Priorities

Charlie is balancing as many, if not more, full-time jobs as there are letters in CEO.

- Working on an exit plan
- Running the business
- Maintaining roles as a husband and dad
- Kingpin communicator with employees and trusted professionals in his circle (e.g. CPA, attorney and investment banker)

A lack of time coupled with a laundry list of responsibilities is a common challenge for entrepreneurs. With multiple offers on the business, Charlie needs help deciding which offer would produce the outcome and protect the lifestyle Charlie and his family desired. This requires holistic planning – a gap in his circle of trusted professional services.

Are You a 56er?

We refer to the business owners we work with as :56ers. Fifty-six minutes past the hour, you have four minutes before your next meeting. What problem can you solve in that time? Which trusted partner will you call to help? As one of your trusted professionals, you don't need to call us. Take those four minutes to refill your coffee and relax. We're already working for you and with you.

2 The Need: Disentangling Complexities and Narrowing Priorities

Charlie had numbers from his other trusted professionals. Carson Private Client team attached a strategy to the numbers. We took into account the complexities of his situation: a reverse triangular merger, separate LLCs and a family generation-skipping transfer trust.

We helped answer questions like:

- How much money will I need after leaving the business?
- How can I maximize after-tax value?
- What can I do to protect my most valuable business assets?

We stepped into the role of strategist, helping Charlie envision his ideal future, post-exit, and provided a strategic plan to make it happen.

3 The Result: Reliable Strategic Support and Goal-Based Outcomes

Charlie had until midnight to sign the dotted line on an offer. It's 9:56 p.m., and he made one last phone call – to the Carson Private Client team.

We didn't just give an encouraging nudge or a basic pros and cons list. We challenged him to look ahead and decide which route would result in his ideal lifestyle. The offer generated $50M after-tax, allowing Charlie and his family to begin the next chapter of their lives and pursue their other dreams.

We continue to serve as a strategic partner, helping the family manage their wealth and the decisions that come with converting their net worth from illiquidity to liquidity. Owning new real estate was important to Charlie and his family. We helped them plan for a home they felt proud of and comfortable in from a financial standpoint. And we helped answer questions like:

- How much should we invest in the market, real estate and alternative investments?
- What is a suitable amount of living expenses?
- How much should we pay ourselves each month?

How Carson Private Client Can Help You

We want to learn more about your goals, needs and wants – and how our team could work with you to fulfill them. Call or email us to set up your strategy session with our team.

Contact Us

Call or email us to set up a complimentary 15-minute consultation.

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