

FOR FINANCIAL ADVISORS

Your client's largest asset deserves *a plan of its own.*

We work with owners on exits and transitions. Exit Architects gives your business-owner clients a clear read on what the company is worth, what is holding value back, and the right path out, so the liquidity event you plan around actually happens.

THE BLUEPRINT · 30-DAY SPRINT

Valuation, value-gap analysis and a coordinated exit plan



Steps 01 to 05 run in 30 days. When a sale is the path, we help select and work with a sell-side advisor.

WHY REFER

- **You stay the lead.** Your client relationship and wealth planning stay with you. We report back to you, not around you.
- **A real number to plan with.** A defensible valuation replaces guesswork in retirement, estate and liquidity modeling.
- **Earlier visibility.** You see the timeline and structure before a buyer sets them, which is when your planning matters most.
- **One coordinated team.** We work alongside you, the CPA and the attorney so every recommendation points at the same outcome.

HOW WE WORK WITH YOU

With your client's permission we share findings with you, invite you into the debrief, and route your areas of work back to you.

WHO IT'S FOR

Owners with \$1M to \$50M+ in revenue

Closely held companies in home services and trades, construction, MSPs, manufacturing, and professional and healthcare practices.

GOOD MOMENTS TO REFER

- Owner aged 55+ with no written plan
- An unsolicited offer arrives
- A partner dispute or buyout question
- A health event changes the timeline
- A question about liquidity or "what is it worth"

When a client's business comes up, start with exitarchitects.co