



Imagine | Protect & Grow | Impact



Do It Right The First Time

## Where I See My Company By December 31, 2021

I am the CEO and majority shareholder of a parent company that has combined the resources of two companies to deliver a unique 3-step process. Mind Your Own Business Better™ is built for manufacturing company owners to increase business value and be “transition ready” on their terms - when they want, for the money they need and to the successor of their choice.

We serve our clients to imagine future possibilities, reverse engineer them, educate and build tailored solutions aligned with what is important to them.

The real benefit to our clients is increased clarity about their future, greater confidence about where they are today and the expanded capability to realize their vision and positively impact the events and people they care about.

- We Are
- ✓ Committed to build relationships based on honesty and trust
  - ✓ Family and community oriented
  - ✓ Responsible for all the things we think, say and do

### Our Promise

We produce the results our clients expect and deserve:  
a happy outcome!

This is our space!



Clients will not find someone without their last name that cares as much as we do.

## What Makes Us Unique

- ✓ We are built to serve manufacturing company owners.
- ✓ We are curious. We ask unique questions to thoroughly understand our client's world.
- ✓ We are discreet. Client confidentiality is the bedrock of our good name.

## The 3-Step Mind Your Own Business Better™ Process

**Phase I: Assess.** A fixed fee assessment designed to prioritize opportunities and determine the merits of moving forward with Phase II. This phase includes the following:

- ✓ Discovery Workbook to uncover our client's most important hopes, dreams, goals and objectives
- ✓ Informal Business Valuation
- ✓ Buy-Sell Agreement Report Summary
- ✓ Life Insurance Policy Audit
- ✓ Business Continuity Instructions
- ✓ Estate Plan Review by Retained Council
- ✓ Exit Planning Assessment
- ✓ The Strategy Diagnosis™ - our written observations and tailored recommendations

**Phase II: Engage.** A fixed fee engagement built to help clients realize exactly what they want and stay in control of their business, family and destiny. Specific service modules to optimize client value include:

- ✓ The BEI 7-Step Exit Planning Process™ - a structured approach to a custom transition plan
- ✓ Identify Owner Objectives
- ✓ Maximize and Protect Business Value
- ✓ Transfer to Insiders
- ✓ Personal Contingency Plan
- ✓ Quantify Business and Personal Resources
- ✓ Sale to Third Party
- ✓ Business Contingency Plan

**Phase III: Monitor.** Our online Progress Monitor Dashboard produces a quick visual of the planning that has been completed and that which needs attending, to help us stay on track for optimal results.

## Client Compliments

We receive high compliments from our clients as is evident by their referrals to other manufacturing company owners. These are some of our habits to earn their trust and confidence:

- ✓ We show up on time
- ✓ We do what we say
- ✓ We finish what we start
- ✓ We only recommend the course of action we would accept if in the client's very same situation

## Culture

Our team members learn, grow and rejuvenate in a healthy environment. This investment creates inspiring and talented associates to enhance the client experience. Our office is conveniently located with state of the art web/video capabilities to interact in the comfort of each client's preferred environment.

## What Our COO Is Saying In Three Years

- ✓ “All of our team members are in alignment with the cardinal rule of Exit Planning: No business exit is successful if it does not leave the selling owner financially secure.”
- ✓ “We have strong financials. No debt. All growth is internally financed.”
- ✓ “Our marketing team generates relevant content welcomed by our multi-generation audiences.”
- ✓ “The transition planning team is driven by BEI, Inc., the oldest, largest and most experienced exit planner network in the USA, to increase business value and create a personalized roadmap.”
- ✓ “The investment team continues to earn industry accolades for their deep bench of portfolio professionals building evidence based solutions with a hyper focus on risk management.”
- ✓ “Our life insurance team’s powerful relationship with industry leaders allows us to offer unique solutions, and their case design and placement rate is first-class.”
- ✓ “The technology team keeps our online applications secure and easy to use.”
- ✓ “The alternative risk management team saves our clients a lot of money and opens doors for additional creative opportunities.”

### What Our Team Members Say

*“I can tell our company cares about me. I am respected and am able to keep the commitments I make to those I care about. Plus, we get to work with the nicest, genuinely caring clients anyone could ever ask for.”*

### Publications Authored By Mind Your Own Business Better™ Team Members

*My Confident Survivor’s Roadmap.* A couple’s preparation guide for life’s inevitable transition.

*My Life After Business Game Plan.* 5 steps to align your freedom of time, money, relationships and purpose.

### Ownership

In Q1 2021 we’ll start diversifying ownership through 2030, then start the process to be ESOP owned with a Captive Insurance Company to manage risks unique to our business.

Our business continuity plan ensures a seamless client deliverable. Our independence allows us to align with others sharing common values and not be beholden to proprietary products and planning systems.

### First Class Advisory Team

We have established relationships with some of the best minds to benefit our clients:

- ✓ Legal
- ✓ Tax
- ✓ Insurance
- ✓ Banking
- ✓ Investment
- ✓ Private Equity
- ✓ Business Appraisal
- ✓ Proactive Aging
- ✓ Captive Insurance, Alternative Risk, Private Client and Commercial Risk Management

## Strategic Memberships

We regularly present to, or advocate for, these organizations of which we are members:

- ✓ Wausau Area Chamber of Commerce
- ✓ Wisconsin Manufacturer's and Commerce
- ✓ Central WI Metal Manufacturing Alliance
- ✓ National Center for Employee Ownership
- ✓ German American Chamber of Commerce
- ✓ Business Enterprise Institute
- ✓ The Genius Network
- ✓ Strategic Coach

## What The Media Is Writing In Three Years

*"Bradley's interest and efforts are bound to extend the longevity of private company ownership for our members."  
Chamber of Commerce*

*"It's the rare individual, if one even exists, that successfully gets their arms around the personal and business planning demands of today's manufacturing CEO. Mind Your Own Business Better™ will help you do just that."  
Manufacturing Association*