

Scope

Exit your business on your terms.

Retainer-based financial advice
for business owners.





Introduction

Put your dream exit plan together

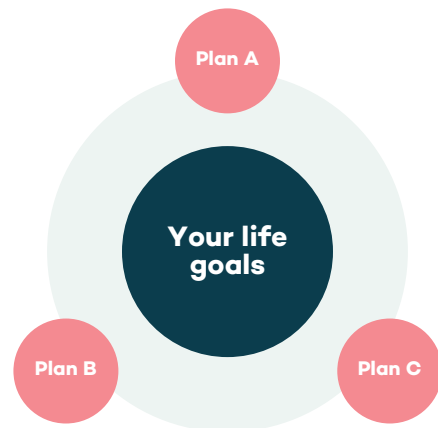
And a Plan B. And a Plan C.

When should you start planning your exit strategy? Now. It's never too early to put a plan in place. And the sooner you do it, the more likely it is that you'll achieve the best possible outcome.

But you're busy running your business. You don't have time or, let's face it, the expertise to research and weigh the relative merits of all the transition, succession, sale and exit options available to you.

That's why we're here. Think of us as your on-call chief financial officer. And as your personal CFO, we'll do all the risk analysis and scenario planning for you, all with your big-picture life goals in mind.

We'll research and explain your options – the pros, the cons, the practicalities. Then, we'll draw up a series of plans and contingencies, or 'layered approaches'. You'll be free to focus on your business knowing that, no matter what happens, you have an exit strategy that works for you and your family.



Our approach

You have personal goals and business goals

Let's reconcile them.

Unlike most financial advisers, we don't take commissions. We don't have vested interests in certain products. Instead, you employ us on a retainer, so you know we've got your back. Always.

It's like we're your very own CFO. And because we're personal financial advisers, as well as business advisers, we're almost uniquely qualified to provide the business exit planning advice you need.

We're specialists in what we call 'the overlap' – the space where your personal financial plans and life goals overlap with your business plans and strategies.

Starting with your big-picture life goals, we'll create an individual, personal and business financial plan. No set products or solutions. Just advice and a plan that revolves around you.

When it comes to your exit strategy, we'll put all the contingencies, safeguards and structures in place to ensure your business exit dovetails seamlessly with your financial life plans.



**As your personal CFO, we'll
do all the due diligence and
contingency planning for you.**



Our methodology

We're with you every step of the way

01 Discovery

What do you want to achieve in life? What's on your bucket list? What do you dream of? What keeps you awake at night? We'll help you work out the answers.

02 Scope

We'll give you your financial life on a page, mapping out where you are now, where you want to be, and how we can help you get there.

03 Strategy

Time to discuss a range of strategies for achieving your business and financial life goals. Together, we'll decide which strategy is right for you.

04 Advice

With your strategy agreed, we'll present our financial advice. Investment, superannuation, insurance or business advice, it's all backed by hard evidence.

05 Implement

Once you've approved our documented financial advice, we'll set everything up and then give you regular progress updates.

06 Progress

Tap into our knowledge anytime. We'll arrange regular reviews, sit down with you, determine how your strategy is going and discuss whether we need to make any changes.

Our retainer-based model

How does our 12-month retainer work?

Everything we do at Scope is personalised.

This includes our retainers. Yours will be tailored to suit you, the complexity of your financial situation and the level of advice and support you need.

Because we work on a 12-month retainer, we're effectively your on-call sounding board for all things finance and business.

It also means we're always working hard and advising in your best interests. If we don't, you can walk away at the end of our 12-month engagement. And we don't want that.

We're so confident you'll see the value in our retainer-based approach, you can try it for free. Our initial discovery and scoping sessions are complimentary.



**Personal financial advice based
on your goals and ethical values,
not commissions.**



Our values

Humanity Decency Ingenuity

Like our business expertise, our financial advice and retainer-based approach set us apart from other financial advisers. It's all part of our mission to be the catalyst for a better life. A mission guided by our values.

Humanity

We're here to listen. To guide.
To inspire. To reassure.
To make life better.

Decency

We're the clear, honest voice of reason in a world of conflict and uncertainty.

Ingenuity

We don't tick boxes or put people in them. We fix problems.
We find smart solutions.

We're in this for the long haul and all the right reasons. No commissions or hourly rates. No doubt that we're 100% here for you.

Our promise: Never fret over or waste unnecessary time making life's big decisions or transitions ever again.

Look forward to them. Relish them.

Embrace them with confidence.

We've got your back.

You've only got one chance to exit Get it right

How we'll help you cover every business exit scenario.

Business sale. Management or employee buyout. A merger. A management or family succession plan. Winding down or closing the doors and walking away.

You've got a host of business exit options and potential combinations to consider. And you need to consider them all because you never know what's around the corner.

In other words, if you want the best possible outcome – the outcome that fits and supports your personal financial plan and life goals – you need contingencies in place.

We'll research your market position and help you put a value on your business. We'll help you assess, manage and mitigate the exit risks and get your business systems, processes and asset structures set up correctly. We'll consider everything: staff retention, legal protections, insurances, the works.

Before you know it, your business will be so attractive you won't want to exit. And that's exactly what we want. The more attractive your business, the more exit options you have. And the more options you have, the more likely it is your business exit will give you what you want.





**Exit with enough money to fund
your post-business lifestyle.
Exit your business on your terms.**

Start with the end in mind

Then start thinking realistically and strategically.

At Scope, we always start with your end game – your life goals – and work back from there. And your business exit strategy is arguably the biggest piece of the financial life planning puzzle.

So, ask yourself, what do you want your life to look like after you've exited your business?

Where do you want to live?
How many holidays will you want?

What about cars, caravans, boats and other big-ticket items?

What do you want to be able to do for, or with, your family?

What capital and income do you need to make all this happen?

Once we've mapped your life goals, we can then turn our attention to your business and your exit strategy. Or strategies. Remember, it's all about covering your bases and keeping your options open.

We'll work with you to:

Establish key milestones and track your progress

Set up accountability measures to keep you on track

Create a prioritised plan of attack

Strengthen your business's weaknesses

From reporting, systems and processes, to financial and employee management, to contracts and supplier relationships, we'll make optimising your business and exit strategy as simple and pain-free as possible

Our values

Our exit expertise

**Build your business exit into
your personal financial life plan.**

**Managing the overlap between your
personal and business lives doesn't have to
be a headache. Nor does your business exit
strategy. Find out more about our personal
financial and business advice.**

To arrange your free discovery
and scoping sessions:

Call us on **1300 566 688**

Email us at **letstalk@scopeadvisory.com.au**

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Clarity
Ingenuity
Certainty

