



**CLEARSTONE**  
WEALTH MANAGEMENT

## BUSINESS AND PROFESSIONAL PRACTICE OWNERS

*When it comes to growing their entire net-worth, business and practice (firm) owners will face a number of challenges. How much should they invest back into their company and what impact will this have on their long-term goals? What is the realistic “value” of their business? How likely is it to actually sell? How to balance the “income” and “asset” of the enterprise with the owner’s real estate, rentals, retirement plans and other investments?*

*With more than 25 years experience, we continue to advise owners through each phase of their business lifecycle so that in time they can transition the company to new owners, partners, employees or to the next generation of family leaders. Our goal is simple: we want our owner-clients to enjoy the full rewards of their important work.*