



**A Robertson Planning Business Agents** are the team you can trust to deliver a complete business solutions and succession plans. Our personal service takes into account that the sale or succession of a business can be a difficult time. After all in many cases the business owner has built their business from scratch, and has invested time and money as well as heart and soul. We understand, and that's what makes us different.

Our team is lead by Leonard Robertson (CPA) and Licensed Business Agent; who has extensive experience in business and first hand experience in selling and succession planning for business.

Our services include:

- Business brokerage for buyers and sellers
- Exit Strategy
- Succession Planning
- Business advisory agency
- Business Assessments
- Strategies to improve value
- Support and referral to a variety of other professionals based on your individual needs.

Our teams experience means that when you are ready to consider moving on, we explore all the available options for you and the business. Making it simpler, and easier to reach your goals.

Sometimes we see our business in one way and the obvious course of action to reach our goals based on our past experience and the experience of other businesses with which we have dealt. This may or may not be the best possible course of action for your business. Each business should approach the succession planning for their business over a period of time and engage professionals to assist in reaching the desired outcomes.

A Robertson Planning Business Agents is a professional agency, with a support team of business partners, all focused on you achieving the very best result. We look at each strategic business unit within your business, your assets, trends and the current market which you are operating within before we commence planning for the future. We consider options such as strategic alliances, mergers or key position placements which we address prior to sale or succession, for each business on an individual basis making the solutions which we deliver tailored to meet your unique needs.

Leonard Robertson is Director of A Robertson Planning. He is a CPA with over 20 years experience in assisting businesses reach their potential through effective planning and efficient financial management. Leonard's experience is reflected in his ability to professionally assess and prepare the business for sale and to develop contracts which meet the needs of the vendor.



### Why Choose Us?

A Robertson Planning Business Agents go the extra step and offer the following introductory services to their clients:-

- First meeting with business owners
- Agreement to proceed to assessment
- Proposal
- Meeting to review agreement and proposal

Our other services include:-

- Readiness assessment
- Exit/Succession plan documentation
- Business preparation recommendations and facilitation
- Owner preparation
- Buyer Search
- Marketing and advertising program
- Co-ordination of negotiations and deal structuring
- Entirely confidential service

When A Robertson Planning Business Agents manage your business sale or succession planning you can relax secure in the knowledge that we'll go the extra mile to make the process stress free and gain the best possible outcome for your future.