

Rockland Trust Business Owner Advisory Services

Who We Are

At Rockland Trust Investment Management Group (IMG), we provide comprehensive wealth management and business financial planning through a personal approach designed to fully understand where you are now, where you want to go, and what you will need to get there. Our knowledgeable advisors partner with you to create a strong understanding of your goals and investment preferences to jointly guide your future.

Our Approach to Business Owner Advisory Services

We specialize in guiding business owners through strategic planning, including internal or external succession planning, while de-risking the outcome and exploring strategies to increase the enterprise value of your business. From valuation to the final selection of advisors, our experts are dedicated to exploring optimal returns while protecting your legacy. Our advisory services are designed to help business owners navigate this complex process by examining their business and providing a personalized approach.

Your Legacy, Our Commitment

Rockland Trust is committed to supporting this transition. Our Business Owner Advisory Strategist is available to guide you, the business owner, through the process of establishing a thorough, well-conceived plan and developing strategies as you confront key questions such as:

- When is the correct time to transition my business?
- Is my company ready, or should I focus on increasing its value?
- Can I retire from my business?
- Who are the likely suiters, and how would they value my business?

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- What about an internal transition to my employees, partners, family, or management team?
- Is it possible to sell my business to an industry leader, a strategic acquirer, or even a private equity group?
- What factors besides the revenues and earnings history affect its value?

How We Support You

Our Business Owner Advisory Strategy supports you through the transition of your business by offering advisory services that are uniquely designed to support your specific situation:

Our Services

Our Owner Advisory Strategist offers innovative tiers of service, designed to help business owners navigate the complex transition process.

Initial Guidance

We start by listening to you and your goals and will provide you with an initial assessment for you to review and consider. This would include both your personal and professional considerations that factor into the decisions about your business, the financial impacts, and needs for retirement. There is no charge for your first consultation with our team.

Business Assessment and Strategy Development

In this tier, we conduct a thorough analysis of your business with one goal in mind—to assess and strengthen the business's ability to produce sustainable revenues and earnings. The objective is to ensure the business is properly positioned to achieve your personal financial objectives and to suggest ways to improve the value as necessary. Our business assessment and strategy development plan will emphasize value enhancement and de-risking strategies to position your company for success. After delivering the plan, we will provide ongoing advice to guide the owner towards implementing its recommendations and achieving its strategic objectives.

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The goal is to provide business owners with access to a seasoned and experienced Business Owner Advisory Strategist. We know that business owners have more strategic options and a higher likelihood of success when a business can validate its human capital, customer relationships, structural capital, and culture that are less dependent on the business owner. Our Business Owner Advisory Strategist works with you, the business owner, to develop and adhere to a unique plan for your business to increase its attractiveness and readiness for a successful transition.

Taking Action

On the final tier, once we have assessed the readiness of your business model, secured your drivers of strategic value, and helped you optimize the attractiveness of your business, for either an external or internal transition, we continue to help by facilitating your selection of transaction advisors and building a complete team to run an efficient process. Your team of advisors would consist of both Rockland Trust and outside experts to ensure the success of your business transition.

Transitioning a business is a serious and unforgiving process in which every step must be properly executed – the first time – if the rewards are to be realized. Our Business Owner Advisory Strategist mobilizes all the experience, knowledge, and resources to support our clients. Our Business Owner Advisory Strategist has entrepreneurial experience, a broad range of experiences in business management of both private and public companies, and firsthand experience serving as an investment banker for over 100 companies over the last 20 years.



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