

Join us.

Finding True Value Workshop Series

Decisions you make in your business today directly impact its attractiveness and value. After spending so much time building your company, you want to make sure you maximize the value before entering the third act of your life, whether that begins in the near-term or in the future. There are things you can do now that will maximize the value of your business.

In February 2019, the acclaimed six-part seminar series, the Owner Roundtables: Finding True Value was offered for the first time. This program has changed the way owners build value while increasing bottom line business performance.

In 2021, we're excited to share that we're offering this exceptional program virtually in the Finding True Value Workshop Series. The sessions are designed for privately held and family-owned businesses with a focus on next generation leaders and prospective owners. Every session includes in-depth content and interactive assignments.

Now is a great time to enroll in this master workshop to learn the tools and strategies to help protect and enhance your business during this period of extraordinary challenge and beyond.

This six-part series will cover:

DATES	TOPICS – The Path to Transferable Value
NOV 5 *	Assessing Where You Stand Know your actual business value and how it compares
DEC 3	Safeguarding What You Have De-risk your business to protect current value
JAN 7	Growing to Greater Heights Implement changes to improve value
FEB 4	Reaping What You Sow Identify succession options and tax efficiency
MAR 4	Integrating You & Your Company Secure future income and lifestyle
APR 1	Putting it in to action Review discussion and case study

TIME Begins November 5

10:30 – 12:30 a.m. CDT (* First session will go until 1:00 p.m.)

COST

\$950 per attendee for the *entire* series

\$750 per additional attendee from the same company (Call 608.445.5727 or email msullivan@provenancehill.com for discount code)

REGISTER

<https://www.provenancehill.com/ftv-series>

Registration deadline: October 29, 2021

Don't miss out on this exclusive opportunity to learn how to increase the value of your business and hear from other owners facing and overcoming similar challenges.

YOUR HOST

Martha Sullivan,
PRESIDENT

CPA, ABV, CM&AA, CEPA, CVGA



Martha, Founder & President of Provenance Hill Consulting, LLC she assists closely held business owners grow and transition their companies through strategic and exit planning and profit & value enhancement.

PROVENANCE HILL CONSULTING

Provenance Hill Consulting, LLC is a boutique consulting firm dedicated to supporting and advising business owners and their teams as they grow profitable, valuable, and transferable companies.

Provenance Hill

Consulting, LLC

Testimonials

"I signed up for the Owner's Roundtable sessions on recommendation from my wife who has worked with Martha Sullivan on various ventures in the past, and as a follow up to other recent planning sessions I had attended.

What I found in attending these sessions is that it's not just the financial condition of the business and making certain that all your financial information is in order when you transition your business, it is evaluating emotional readiness as well. I liked the overall concept that there is a step-by-step systemic process to follow with milestones to reach in order to insure financial and emotional readiness to transition your business. The six two-hour sessions laid out how to ensure your business is healthy enough to transition to the next phase, whether that be an employee stock ownership transition, an internal transition, or a third-party sale.

Martha is very professional and organized. It's Provenance Hill's business to make sure clients get from point A to point Z. Martha kept us focused and on task.

The Finding True Value workshop sessions are absolutely beneficial to any company in helping to understand it's true worth. Any business can benefit from attending these sessions as it is imperative to know the health and wellness of your business at any juncture, but I would especially recommend business owners looking to retire in the next few years attend these sessions."

Al Bachmann, President | Bachmann Construction



"I decided to sign up for the Finding True Value workshops with Martha Sullivan because my wife and I have begun to talk about retirement and what we would like to see for the business. We would like to sell to our son, but we realized there is a lot to consider. These sessions revealed how much we need to prepare in order to execute our plan.

The sessions were very educational, and Martha's professionalism and presentation style made the classes interesting. I appreciated the added benefit of the opportunity for a one-on-one session with a lawyer and financial advisor to ask questions and get personalized answers.

In today's world, we recognize that our employees are our most important assets, so I really appreciated the opportunity to learn even more in order to serve as an advocate for our employees as well and guide them in the right direction. I was able to gain additional education on our Simple IRA plan as well, and now feel more qualified to help our employees make good decisions about their retirement plans.

Overall, I would definitely recommend other business owners take advantage of these workshops. They are worth the investment."

Larry Benn, Owner | Auto Tech



"Martha Sullivan did a fine job facilitating the Finding True Value workshop sessions. She kept it informative, and we learned a great deal.

While we understood how to run a business going into it, attending the sessions opened our eyes to a whole new level of understanding how our business could be run and ultimately increasing the value for when we want to sell our business. We've always known the value of a business is proportional to the EBITDA but attending Martha's sessions taught us how to affect the multiplier of the EBITDA in order to increase the value of our business.

We would definitely recommend the sessions to others. In fact, we are considering sending our kids."

Dave Dohrman, President/GM | DAD Manufacturing, Inc.



"I highly recommend the Finding True Value sessions with Martha Sullivan and Provenance Hill Consulting to anyone who owns a business. As a business owner of a professional service firm myself, and approaching retirement, I was very impressed with the leadership and quality of the program.

Martha Sullivan is an enormously qualified professional with vast experience in business transactions, valuations, and family businesses. Martha has a nice overall grasp of the key issues facing business owners as they transition.

I was very pleased that each session built on the other. First, we determined the value, then the risks to value, then managing value. Each session complemented the last session. The take-home assignments were very valuable and thought provoking. You were required to think about how the material presented applied to your own situation. Then we discussed at the next session, ensuring that each session was very personally tailored to each of the participants.

Every attempt was made to insure both professionalism and objectivity at the sessions. No products were being sold. The intent was to inform business owners on the process of transitioning their business, to identify their options and view the pluses and minuses of each of those options.

Overall, the materials were excellent, and there was substantial value for the time commitment involved to attend the sessions. I would recommend the program in a heartbeat."

Scott Miller, CPA/ABV, CEPA, Founding Partner | ESI Equity

