

Do you have an
exit strategy
for your
business?

How will you
maximize one of
your largest
assets?

Most business owners are busy running their business, managing employees and customer relationships.

Business Planning Components:

- Key Executive Compensation
- Benefits Analysis
- Key Employee Retention Techniques
- Business Succession Planning
- Entity Structure/Taxation/Payroll Services Audit/HR
- Employee Benefits & Qualified Retirement Plan (401(k), Profit Sharing & Defined Benefit Plan) Analysis
- Informal Business Valuation
- Personal Financial Planning for owners/key executives

Plan ahead to help achieve your financial goals - not only for your business, but for your family.

Contact Kate Langthorn, CEPA today at
(713) 331-1563 or
kate.langthorn@imgfinancialgroup.com to
schedule your complimentary meeting.



Exit
Planning
Institute™

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Kate is a certified exit planning advisor with IMG Financial Group in Houston. Kate specializes in assisting business owners, professionals and families with the accumulation and preservation of wealth and is dedicated to delivering high quality service to her clients. Kate's passion is helping to create efficient long term financial strategies, focusing on life's big events. Kate realizes that while most people are well intentioned to protect and prepare their families or businesses for life's unexpected occurrences, executing financial responsibility often doesn't top the list of people's priorities. She helps people move from being well-intentioned into action.

Kate is dedicated to building long term relationships with her clients. Her signature process is comprehensive financial analysis. Some of her specialties include: business planning, succession strategies, legacy planning, investment advisory, and insurance planning. She received a Bachelor of Business Administration in Finance from Texas A&M University and holds the Series 66 and 7 Securities Registrations along with her life and health licenses.

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