



Case Study

Complexity Becomes Clarity

The Issue:

For the owner of a construction company, complex issues in both his business and personal affairs were affecting his ability to run his company. He faced a long-standing tax situation, his debt structure was a daily concern, and he was unsure of his cash flow beyond 30 days. Although his estate was quite significant, nothing had been set up beyond basic wills and trusts. In addition, there was no succession plan for the business or the owner.

The Solution:

Using The FullView Solution, FullView Financial pinpointed the many issues involved and rolled out a plan to address them all. First, FullView improved coordination between the owner's attorneys and accountants to resolve the tax issue once and for all. Additionally, the owner's real estate was removed from his personal and company name and moved into family partnership structures, producing immediate estate tax savings of more than \$2 million. A debt reduction schedule was set up based on a sustainable cash flow projection that wouldn't affect operations, and a gifting program was started for estate purposes.

The Result:

The owner is thankful for the confidence and new sense of freedom he gained working with FullView. His priorities have been simplified, allowing him to focus on growing and strengthening his company. With a succession plan now in place, he's ready for a change in ownership—on his own terms—within the next 3 years.

This case study is for illustrative purposes only. Individual facts and circumstances may vary. As a result individual results may vary.

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