

Consulting Process for Business Owners

Discovery

Design

Implement

Maintain

Fact Finding
Goal Setting
Goal Prioritization
Current Balance Sheet
Current Cash Flow

Dangers
Opportunities

Cash Flow
Income Tax Reduction
Asset Protection
Disability Protection
Estate Planning
**Business Succession-
Exit-Transition
Planning**
Liquidity Planning
Charitable Planning

Legal
Financial
Insurance
Compliance

Plan Review
Plan Compliance

Changes in law
Changes in goals
Changes in situation



MICHAEL M. McDONOUGH, INC.
Helping Protect, Grow & Distribute Wealth