Business Owners

Helping small business owners protect and diversify wealth

STREAMLINING YOUR FINANCIAL FUTURE

You've spent years building up your company, bringing in millions in revenue and weathering the ups and downs of business. Now it's time to take your wealth and plan for the future, whether that means saving for retirement, paying for college for your children, or selling your business.

BGM Wealth Partners works with business owners just like you, crafting financial road maps for achieving professional and personal financial goals. Using a comprehensive, custom approach, we can help you protect the wealth you've built, invest responsibly, minimize your taxes and plan for whatever's down the road.

COMMON FINANCIAL CHALLENGES

- What are my best options for transferring or selling my business?
- Am I saving enough for retirement?
- How do I manage fluctuating, volatile income?
- How can I avoid paying too much in taxes?
- Am I properly diversifying my wealth outside of my business?
- What steps can I take to protect my wealth in good times and bad?
- What do I need to do to pass on my wealth?

HOW WE HELP

When you become a BGM Wealth Partners client, we help you protect and grow your wealth so you can thrive—even during financial uncertainty. As business owners ourselves, we're keenly aware of the challenges you face every day, and we offer knowledgeable, sound advice unique to your professional and personal situation. We can help you:

- Strategize and maximize your executive benefits
- Reduce your tax liability
- Protect your wealth against bankruptcy and lawsuits
- Build liquidity for rainy days
- Reduce risk and smooth out income volatility
- Build an investment portfolio that protects wealth
- Choose long-term and short-term strategies for retirement saving
- Execute estate planning strategies to protect both your business and your family

SERVICES

- Tax planning
- Retirement planning
- Risk assessment and insurance analysis
- Estate planning
- General business consulting
- Investment management
- Income analysis
- Social Security maximization strategies
- Education planning
- Business succession planning

WHAT YOU RECEIVE

- End-of-year tax planning strategies
- Semiannual meetings
- An annual retirement analysis
- Proactive emails, phone calls and meetings
- Coordination with your accountant, attorney and insurance agent
- 24/7 access to your financial dashboard