



From One Generation to the Next

Passing on the Family Business, Lifestyle, and Legacy

Secure the future for your family...your business...your dreams

No matter what kind of operation you run, you have a remarkable capacity for strategy, planning years into the future despite an incalculable number of variables

Greco & Associates can help ensure your business continues to thrive for years to come and that your family and employees remain protected, no matter what the future holds.

- ❖ We help owners understand the consequences of operating without a written plan
- ❖ Making sure "a" succession plan dovetails with your estate and wealth transfer strategies.
- ❖ Multi-generational "bloodline" planning. Insurance positioning and risk management reviews
- ❖ Structuring and funding well-thought-out buy/sell arrangements between shareholders
- ❖ Contingency planning and business continuation planning.
- ❖ Key employee retention strategies.
- ❖ Business Valuation

No Charge for Initial Consultation and Business Valuation for LICA Members

Trusted for 57 years

GRECO
& Associates
FINANCIAL SERVICES
"Helping you write the story of your life."

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