

Strategic Solutions for Construction Companies

Who We Are & Why We Do What We Do



We believe privately held businesses best preserve a founder's ideals and legacy. Their owners are natural stewards of their resources, aligned with both their own interests and those of the communities they serve. These values are further extended through the local foundations and charities they support with their time and financial resources.

EXIT PLANNING

Owners transitioning to third-party buyers, ESOPs, or key employees:
Evaluate ownership goals: control, tax flexibility, or legacy
Structure: asset vs. stock sale

SUCCESSION PLANNING

Focused on *family harmony* and fairness:
Active vs. non-active family roles
Sweat equity vs. inheritance
"Fair" vs. "Equal" in estate transition.

Proactive planning can help protect your life's work - let's build from the same blueprint.

1. Maintaining working capital
2. Clear operating agreements & buy/sell plans
3. Protecting the business with key employee, disability, and life insurance
4. Avoiding cash flow constraints and legal or ownership disputes
5. Family Asset Protection
6. Spousal Income Replacement



For more information, please contact Tara James, (531) 710-4843 or tara@coordplan.com