

Crowe Wealth[®]

Crowe Wealth Management, LLC

Family and Owner Managed Business Planning Services

Business and Ownership Transition Planning

The key to effective transition planning is to understand what the family, owner(s) and company want to happen. This may involve transferring the business within the family as well as alternative exit and succession strategies. We assist families in evaluating whether their goals are feasible and achievable and help them work together to establish a plan that is supported by all.

Strategic Business Planning

Brings a clear focus to all the resources of the business while creating a team approach to planning. Helps family members establish a shared vision and lay out a roadmap to reach that vision. Realistic goals and an agreed upon plan of implementation assure you of both immediate and long-term results.

Creating Family and Governance Structures

Long-term success of any organization or group requires structures for decision-making, issue management, planning, and relationship maintenance be established. Family and governance structures bring order, consistency and continuity to the varying, and often conflicting, priorities of family relationships, business operation and ownership expectations.

Relationship Renegotiations and Conflict Resolution

Crowe Wealth Management's professionals work directly with family members, owners and managers, both individually and together, to address new or nagging problems and conflicts that are especially sensitive and complicated. Relationship renegotiations is designed specifically to break through barriers that have stymied you in the past, nail down renewed commitments for the future and build a stronger sense of unity in your work together.

Successor Assessment and Leadership Preparation

Successor development requires a combination of clear expectations, roles and responsibilities with appropriate work experience that builds competence and confidence for the future. We use a variety of objective assessment and feedback methods along with the creation of a successor development plan that links successor's capabilities and development needs with the future leadership and management needs of your business.

Individual Executive Coaching

Solution focused one-on-one coaching sessions to restore clear thinking, confident decision-making, perspective and motivation for the leaders and executives of private companies.

Organizational Management Design

Focuses on creating clear responsibilities and accountability, building a genuine sense of business partnership among individuals and forming effective management structures that fully support both the goals of your business and the aims of your family.