

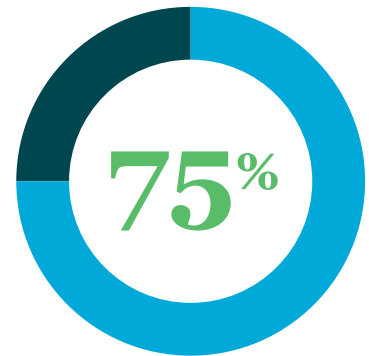


# Beyond the sale

## Guiding business owners through one of life's most consequential financial events

### Why participate in this program?

- 4.5 million privately held businesses, representing \$14 trillion, may transition by 2033<sup>1</sup>
- Many advisors focus narrowly on the financial aspects of a business transfer, and only over a short period of time
- You can create significant value for business owners before, during and after a transfer



*of business owners would like to exit their business within 10 years<sup>1</sup>*

#### LEARNING OUTCOMES

Engage business owners with proven conversation-starters and practical tools

Offer guidance that addresses financial, practical and emotional complexities

Execute an action plan for turning specialized knowledge into business growth

#### QUESTIONS ADDRESSED

How do I effectively engage business owners with end-to-end transition guidance?

How can I efficiently scale offering business transition guidance across my practice?

How can I add value throughout the business transition process?

#### FORMAT

50-minute live presentation

One hour available CE credit for CFP and IWI, CPE credit for CPAs

### Summary

For business owners, transitioning out of their business is a deeply personal journey — it involves their life's work and sense of purpose as well as their wealth. This program prepares advisors to effectively lead a team of specialists guiding business owners through the complexities of a transition, helping ensure a successful outcome and building lasting client and referral relationships.

This approach helps me differentiate the value I offer to business owners

I can now position myself as leader of a team of transition specialists

My business owner clients really appreciate the guidance and support

## Additional resources

Appropriate for use with clients, these materials can support your planning conversations with business owners.

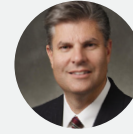


**Actionable articles** that help you engage business owners and offer relevant tools and strategies



**The next generation of wealth transfer**, a related educational program, supports offering a customized path to wealth transfer planning to all clients

## ADVISOR EDUCATION SPECIALISTS



**James Bergeron, J.D.**



**Robert Kron, CFP®**

Contact your Nuveen Advisor Consultant today at 800.221.9271 for more information.

### About Nuveen Advisor Education

Nuveen brings our financial professional partners — and their valued clients — an award-winning group of subject matter experts ready to share ideas, insights and educational programs. Whether it's a focus on enhancing an advisor's practice, acquiring new clients or current, actionable market and asset class insights, Nuveen offers timely and relevant content and programs.

*We look forward to partnering with you.*

<sup>1</sup> Source: Exit Planning Institute, 2025.

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