

The Founder's Road Map

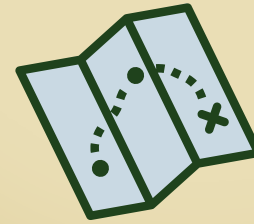


Pleasant Street
WEALTH ADVISORS

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At Pleasant Street Wealth Advisors, We are Founders.

We have developed a road map that concurrently addresses your business and personal challenges from the day you receive funding throughout your career and into retirement.



1 SEED FUNDING

Someone believes in you and your idea enough to write that first check. Now you need to handle all of the transactional parts of starting a business: **Setting up Payroll, Key-Man, and Director's & Officer's Insurance.**

We have the relationships and expertise to help you quickly get these items done so you can focus on building the business.

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3 BUILDING THE TEAM

As your company grows, the corporate needs evolve.

- **We can help you build an employee benefits package to attract & retain great people.**
- Review Risk Management to enhance business protection. **Adding cybersecurity, Fiduciary, EPL, and other policies.**
- Our national network of potential investors and advisors **can help the company move past development by providing experienced advice, guidance or, more funding.**

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5 MATURING PRIVATE COMPANY

Over this journey, Founders develop the skills and perspective younger companies seek. Founders have the resources and tools to become investors, advisors, or board members for other founders. **We can help you find that next journey.**

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2 FOUNDER FINANCIAL PLAN

During this time, founders do not have access to steady cash flow, employer health insurance, and retirement accounts. **We work with founders to assess their current situation and navigate the challenges of protecting themselves and their families while building their company. Providing peace of mind that there is a plan in place.**

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4 BUILDING YOUR FOUNDATION

Retirement plan design provides Founders with the opportunity to enhance their own retirement savings, take control of their taxes and make up for lost years of saving. **We help founders navigate the benefits plan design, purchase real estate, and other life events that often occur as their success grows.**

4

6 LEGACY

Founders who reach this part of the journey face what we call "The Burden of Success." **We work with them to thoughtfully protect their family and, ultimately, enjoy the financial benefits of their success.** This is when we often discuss the best ways to pass on important family values and build a lasting legacy.

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