



**Rational Wealth
Solutions**

VALUED CLIENT CASE STUDIES

**MAKING THE
COMPLEX
DECISION TO
SELL A
BUSINESS
THAT TOOK
A LIFETIME
TO BUILD.**

The client owned a successful veterinary practice and was ready to sell and retire to spend more time with wife and family after many years building the practice and taking care of his beloved clients' pets. He and his wife came to me as they faced a dilemma - to sell to a venture capital group buying up vet practices and offering more money or sell to a local group of doctors he knew and trusted to continue practicing as he would but offering much less money. A greater payout was attractive and could provide his family with more financial security in retirement. However, the direction of the business and the value he placed on his reputation in the community caused him to hesitate.

Together, we worked on their financial plan, including future hopes and desires, like the purchase of second home at the beach they love. What I illustrated was, of course, more money for the practice would likely mean more in the end but that the lower sale price could also allow them to reach their goals!

Our planning sessions and many discussions brought confidence to him as a proud business owner as well as his wife looking to enjoy retirement with her husband. The financial plan helped them both visualize how their important decisions now could play out in the future, including greater expenses than they could anticipate and a legacy for their three children.

Important Disclaimers:

These case studies are provided for educational and illustrative purposes only. They represent specific client scenarios, but they are general in nature. The client circumstances, planning solutions, and results are based on specific facts tied to unique client situations at a specific point in time. They are created with the benefit of hindsight and are meant to provide a general overview of our process, methodology and services, they are not a guarantee of any future results as favorable results cannot be guaranteed even in a similar scenario.

Please understand that forecasts, estimates and projections used in many planning scenarios are inherently speculative as they are based on assumptions which may involve known and unknown risks and uncertainties. Future results may differ materially, compared to what is discussed herein, due to market and economic conditions, client circumstances, and other factors.

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