



Planning for Growth

Your business journey as an entrepreneur is unique. As you scale up, your needs become more diverse and complex. Knowing what to expect and how to prepare is critical to your success. We can help you build a plan to get you there.

➤ Support for Every Business Stage



FOUNDATIONAL

Addressing business basics early on will facilitate growth in a stable, viable manner.



GROWTH

Your business is ready to grow. Get direction on how to build and enhance your business value.



ESTABLISHED

You have created substantial business value. Let's protect what you've built.



TRANSITION

You've built a successful business and you're looking for guidance on how to realize the maximum value on your terms.

Strategy

- Business plans
- Financial modelling
- Cash flow planning

Greenfields

- Break-even analysis
- Debt service analysis

Initial Acquisitions

- Evaluations
- Transactions

Corporate Structure

- Tax
- Regulation
- Financing
- Risk management
- Divestiture
- SR&ED

Accounting

- Outsourced Bookkeeping and IT
- Financial Systems
- Assurance

Tax Planning

- Corporate
- Indirect (GST/HST)
- Personal
- Shareholder remuneration

Operations

- Performance management
- Leadership and Governance
- Centralized administration and services

Accounting and Financial Systems

- Enterprise Resource Planning (ERP)
- Single or multi entity standardization and reporting
- Financial Planning & Analysis (FP&A)
- Assurance

Multiple Acquisitions

- Sourcing
- Evaluations
- Transactions
- Integrations

Digital Platforms

- Data analytics and benchmarking
- Systems integration
- Customer Relationship Management (CRM)
- Technology Advisory

Human Resources

- Human resource policies and protocols
- Incentives and ownership
- HR management, team development, culture

Funding

- Debt and Equity

Shareholder Needs

- Personal financial planning
- Estate planning
- Insurance planning
- Comprehensive family information management

Risk Management

- Business resiliency
- Fraud prevention and detection
- Cyber security
- Asset protection strategies

Succession Planning

- Strategy
- Options
- Action plan
- Implementation

Divestitures

- Strategy
- Options
- Transactions

Family Needs

- Financial planning
- Wealth oversight
- Governance and education
- Philanthropy

