

## GFA Guidance/Recommendations

- Recent acquisition and recap by PE firm of company located in Southeast. Aggressive growth strategy focused on roll-ups of small operators in need of capital or a succession in key target markets.
- CEO was former head of institutional sales team in a hedge fund company I cofounded.
- Made introduction to existing client . Three (3) years later \$4.0mm in organic sales.
- Newly installed as CEO and recently married with new-born. Needed wills, trusts, insurance, etc.
- Recommended counsel in Southern Florida, worked with counsel devising a comprehensive family wealth and protection plan
- Put in place a comprehensive term and permanent insurance program integrated with the overall family plan.
- Developed and coordinated risk management program with top carriers to insure new residence, automobiles and boat, with adequate protection against flooding
- Currently looking at key man protection for the benefit of the PE investors and family.
- Ongoing introduction of banking relationship to improve lending facility and also bank is a major private equity deal sponsor.

## Impact

- By driving process, saved client time and legal fees
- Placing \$1.5mm permanent insurance funded by trust eventually owning entity interests
- Plugged income gap of \$12.5k/month, tax free protection
- Saved \$1k pa, preferred carrier, placed umbrella of \$10mm

## New Client: CEO

Fresh Food Distribution Company, recapped by PE firm