

I help business owners,
like you, protect their
largest and most valuable
asset — their businesses.

Your business is your family's lifeblood; a pillar in your community. My goal is to help you stay focused on the task at hand — running your business — while together in concert with your trusted advisors, helping to create a financial road map for the long-term success of your business.

I can help you...

- attract and reward top talent — and protect your business in the event that you lose one of them
- design a strategy to transition the business in the manner in which you choose
- protect your family and your business in the event something unexpected happens to you or one of your business partners
- create a retirement strategy that isn't solely dependent on the business
- understand the value of your business, as well as what's driving that value
- identify the tax advantages available to you as a business owner



The information provided is not written or intended as specific tax or legal advice. Representatives are not authorized to give tax or legal advice. Individuals are encouraged to seek advice from their own tax or legal counsel.

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**Your business is
your passion,
helping you
protect it is mine.**



I help business owners identify and prioritize the protection and financial strategies that are critical to the ongoing success of the business — throughout every stage of the business.

With understanding the value of your business as the foundation, I can help you address the core planning pillars — family, business, future and team — so you can help minimize personal, business and financial risk.



Protect Your Family

I help ensure that your protection planning extends beyond the business and to your family and heirs, including:

- Protecting your income stream
- Being fair and equitable regarding the distribution of your estate
- Managing debt

Protect Your Business

There are steps you can take to help mitigate some of the risks that can threaten the viability of your business, such as:

- Drafting and properly funding a buy-sell agreement
- Protecting against the loss of a key employee
- Determining the value of the business

Protect Your Future

I help ensure that the income and lifestyle you've become accustomed to as a business owner can still be achieved when you leave the business by:

- Building a retirement income strategy
- Focusing on growing enterprise value
- Understanding available exit options

Protect Your Team

The importance of having benefit plans in place to encourage top talent to stay loyal and keep the business ahead of the competition can never be overstated. This includes:

- Offering employer-sponsored retirement plans
- Providing selective benefit packages to top performers
- Choosing and grooming the appropriate successor to the business

