

Our Approach to Working with Business Owners in Transition

Transitions...including the sale of a company...

bring new responsibilities and questions.

At Fairport, we are dedicated to guiding clients before, during
and after these significant events.

Fairport understands the unique needs of business owners who:

- have great entrepreneurial spirit, typically high risk preferences and look to a wealth manager to keep track of the complexities of their financial picture;
- need objective advice while working with multiple transactional advisors;
- want to achieve their dynamic personal, family, economic and philanthropic goals.

The Fairport Advantage:

Our professional advisors (which include CPAs, CFP® certificants and CFA charterholders) have experience working with high net worth business owners at every stage of life to coordinate and implement a succession and liquidity plan that fits their distinct situation. Fairport has the capability to interface with other professionals on the client's behalf to deliver an integrated, focused experience.

Fairport's expertise in working with business owners stems from decades of experience. The importance of listening and continually connecting with them throughout the relationship is paramount. Fairport's professionals understand how challenging and emotional this transition can be and act as the client's trusted advocate every step of the way.

The Fairport team is adept at providing strategies that are specific to the issues faced by business owners in transition. These strategies include examining tax implications, generating forward-looking cash flow scenarios, and implementing investment strategies to provide the client with peace of mind.

Confident navigation for high net worth clients.