

# The Platform Process™

Applying relevant solutions to support your business

REVENUES  
EXPENSES

PROFIT

## 1 New Business

- Investment Capital
- Debt Repayment
- Revenue Growth
- Risk Protection

## 2 Developing Business

- Investment Capital
- Debt Repayment
- Employee Benefits
- Risk Protection

## 3 Established Business

- Retained Earnings
- Debt Repayment
- Employee Benefits
- Executive Benefits
- Retirement Planning

## 4 Transition Business

- Income Planning
- Estate Planning
- Succession Planning
- Family Trust
- Charitable Giving



Helping businesses prosper...for generations

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