

Partnership launched to assist business owners with transition and exit planning

Protect. Prepare. Maximize.

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(Wisconsin / Florida / Pennsylvania) Selling a business is never simple, which is why a new partnership has been launched to help business owners as they navigate through the process. [Cornerstone Business Services](#), [James Moore & Co., P.L.](#) and [Velocity Advisory Group](#) are joining forces to provide comprehensive services to help business owners protect their business, prepare them and their teams for the future, and maximize what's important to them.

"James Moore and Velocity regularly work together on value enhancement and business readiness collaboration, but we did not have M&A experts as part of our services, which is why we are pleased Cornerstone is joining us to round out this effort," stated [Mike Sibley, a partner with James Moore & Co.](#) "Our goal as a Transition Advisory Team is to provide everything a business owner needs as they plan for, what will be in many cases, the biggest financial transaction of their life."

"Business owners often have as much as 90% of their net worth invested in their business, so it is critical that they plan well in advance in order to have options when they decide it's time to sell," stated [Scott Bushkie, Managing Partner and Founder of Cornerstone Business Services](#). "Our partnership will help them plan and prepare to maximize what's important to them. While profit is part of that picture, it may also include successfully transitioning to the next generation of family leadership, selling to a firm that will retain existing employees or finding a buyer who will expand the company's footprint."

"Each of our firms provides distinct, yet complementary services," added [Heather Parbst, Director of Ownership Transition Planning of Velocity Advisory Group](#). "We'll make sure owners have the right players at the table who are looking out for their interests; whether it's a business valuation, reviewing and organizing the financials, developing your management team, installing processes and systems, maximizing what's important to you in a transition, determining a successor or dealing with the inevitable emotions that are tied to a business sale. We provide a seamless partnership of comprehensive expertise that is not found elsewhere in the M&A world."

Some of the services provided by the partnership include:

- Business and market analysis
- Evaluation of exit planning objectives
- Analysis of exit planning options
- Assessment of the current performance of the business or organization
- Readiness assessment
- Value enhancement programs
- Tax planning
- Successful transfer of the business

Partnership members are focused on working with owners of firms in the lower middle market, with \$500,000 to \$10 million of EBITDA or \$5 million to \$150 million in revenue. Sibley summarized the partnership effort by saying, "Anyone who owns a business wants to go out on their own terms and we'll help them do just that."

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James Moore & Co., founded in 1964, is a regional CPA and consulting firm with offices in Daytona Beach, DeLand, Gainesville and Tallahassee, Florida. The firm specializes in providing tax, auditing, accounting and controllership, wealth management, technology solutions, human resources and business consulting services. For more information, visit www.jmco.com.

Cornerstone Business Services, Inc. is a boutique investment banking firm, providing strategic consulting, valuations and mergers and acquisitions services to lower middle market companies. Cornerstone's corporate office is located in Green Bay, Wis., serving clients nationally and internationally. For more information, visit www.cornerstone-business.com.

Velocity Advisory Group offers strategic planning, executive coaching, training and consulting services focused on strengthening senior leaders. They also deliver speaking engagements in the areas of strategy, culture and leadership. The firm is based in Philadelphia, PA. For more information, visit <https://velocityadvisorygroup.com>