

owner hotspot programs

“Short, sharp programs designed to put the owner back on track.”

Typical issues:

- Owner works huge hours and often unable to rely on management team.
- Too many opportunities, too many problems.
- Poor sales growth and declining margins.
Uncontrolled growth.
- Potential loss of family assets should things go wrong.
Unbalanced risk.
- Too much tax. Possible CGT on future business sale.
Old structures.
- Owner in 50s or 60s with little idea of exit alternatives.
- No clear concept of business value and how to build it.
- Business is the “owner’s superannuation”.
All of the eggs are in the basket.
- Unplanned succession due to sickness or death, would leave behind a mess. Unclear wills or trusts excluded.

Fordham have the experience, expertise and programs to deal with these issues.

Contact us

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Australia’s only firm of specialist advisors dedicated to the needs of the owners of private businesses.

With 180 professional staff and 45 years of experience in advising business owners, Fordham works with bankers, financiers, lawyers and advisors to help their clients:

- Get more growth and profit from their businesses
- Improve corporate and tax structures often locked in the past
- Provide direction for planning the succession of the business
- Structure and manage the sale of the business
- Assist in understanding and execution of estate plans, and
- Design a process likely to pass wealth to the next generation

Case study: Mark Johnson

Full circle. The challenge for the Johnson family was to see their business reach the third generation. Thanks to the referral from their bank manager, the Fordham succession planning process ultimately saw Mark take over and his parents retire. Five years on and Mark continues to build one of Australia’s most successful wholesale security services enterprises.



Mark Johnson
Managing Director and Owner
Locksmiths Supply Company
client of Fordham
his story inside...

Fordham owner hotspot programs

Program	Business performance	Structural review	Succession planning	Exit options	Estate planning	Inter-generational wealth
Key questions	How can we grow profitably?	Paying too much tax? Are assets unnecessarily exposed to risk?	How can the business operate without the owners?	What is the business worth, and who might buy?	What would happen if...?	Will a transfer ruin the childrens' lives?
Methodology	Each program commences with an interview with the business owner(s), generally on site. Prior to commencement of the workshop, copies of relevant documentation and financials will be required, depending on the program. Two half-days are scheduled with a Fordham director and the business owner(s). The process involves a situational analysis, and understanding and definition of desired program outcome and then a plan to achieve that result. The process is fully documented and confidential to the owner.					
Outcome	To develop a strategy for changes needed to optimise management structures and improve business performance.	To gain an understanding of the faults of current structures and have a plan to rectify issues or mitigate downside.	To have prioritised alternatives and build a path whilst still in good health and a position of control.	To understand value, price and competitive advantage and have a strategy to maximise after tax proceeds on exits.	To have considered alternative scenarios and to co-ordinate documentation to ensure all family assets are dealt with.	To understand the impact of sudden wealth and to develop strategies to minimise risk of family disharmony.
Price (ex GST)	\$6,000 to \$10,000 Depending on quality of accounting records.	\$8,000 to \$10,000 Depending on number of entities.	\$8,000 to \$12,000 Depending on number of owners.	\$8,000	\$8,000 to \$10,000 Depending on variety of dependents.	\$8,000
Further work?	Possible follow up meetings to ensure execution.	Need to brief lawyers to rectify problems. Possible tax issue investigation.	Possible follow up meetings to ensure execution.	Sale of business process itself. Typically \$60,000 to \$100,000.	Assembly of file for lawyer briefing. Monitor execution.	Instruction document creation.
Satisfaction guarantee?	Yes	Yes	Yes	Yes	Yes	Yes