

One Team, One Strategy

THE CHALLENGE

Selling a business is a major financial and emotional milestone, often complicated by family dynamics and long-term planning. While advisors are essential, success depends on their alignment, clear communication, and guidance throughout the process. When a family-owned funeral home faced delays and confusion from fragmented advice, Foresight was brought in to coordinate the team and ensure a successful sale.



THE SOLUTION

MILESTONE #1: CHOOSING A SUCCESSOR

The owners hoped their grandchildren would take over, but their inexperience and limited financing made this unfeasible. The bank's initial advice was vague and overly optimistic. In reality, the deal required a significant discount and risky seller financing, exposing the owners if the grandchildren defaulted on payments. Once this was clear, the family opted for a third-party sale, allowing the grandchildren to grow in the business without heavy debt.

**With the right team in sync,
a complex family sale became a
confident close—and setting up
the next generation for success.**



MILESTONE #2: CHOOSING THE BEST OFFER

Once on the market, multiple offers came in. The owners requested “best and final” bids—each buyer’s top offer with no room for negotiation, but still questioned whether the price could be pushed higher. Conflicting valuations and unclear retirement goals created hesitation. We brought all advisors together for a single conversation, which resolved two key issues:

- One valuation was based on outdated assumptions, not market data.
- The owners’ financial needs had been overstated due to overly conservative retirement planning.

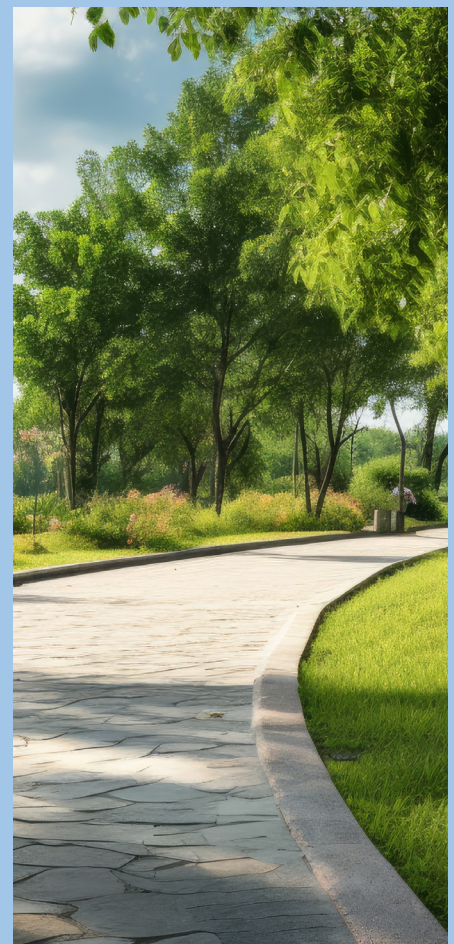
Once aligned, the owners accepted the best offer with confidence.

MILESTONE #3: NAVIGATING DILIGENCE

During due diligence, poor coordination between attorneys caused unnecessary delays. While all issues were resolved, earlier alignment would have streamlined the process and closed the deal much faster.

THE RESULTS

- Sale closed at a strong market value.
- Owners met their financial goals.
- Grandchildren found meaningful roles without heavy debt.
- Deal moved forward smoothly once advisors were aligned.



KEY TAKEAWAY:

Unified advisors lead to a smoother, faster, and more confident outcome.