RonaldBlueTrust®

Wisdom for Wealth. *For Life.*®

Business Consulting

A DIVISION OF RONALD BLUE TRUST

Ronald Blue Trust's Business Consulting division leverages biblical wisdom and practical expertise to advise business owners as they seek to faithfully steward the companies with which they have been entrusted. Our experience in advising businesses and their owners on various growth and transition planning strategies helps us to design and orchestrate plans unique to each client's needs.

WE EXIST TO SERVE BUSINESS OWNERS IN THE FOLLOWING WAYS:

- Determining Purpose — helping them ask the "right" questions
- Enhancing Value — helping them increase the organization's influence
- Preserving Legacy — helping them sustain the company's impact

The following characteristics make us distinct in the delivery of these services

OUR UNCOMMON PERSPECTIVE

We believe that biblical wisdom and biblical principles can be practically applied to build healthy, valuable businesses.

OUR HOLISTIC APPROACH

Ronald Blue Trust's familiarity with the unique needs of the family and the business allow us to handle the complexity involved in these situations with a fully integrated team approach.

OUR STEWARDSHIP FOCUS

Many business owners desire to be generous in and through their business, but are often limited through their cash donations. We work with business owners to create strategies to be generous with both the financial and relational capital (e.g., employees, clients, vendors, and community influence) with which they have been entrusted, which can often have a greater Kingdom impact.

Our Focus

The Business Consulting division focuses on helping companies seeking greater purpose, needing strategic advice, and anticipating major ownership change. We employ a highly consultative approach to meet these needs utilizing the following core services:

DETERMINING PURPOSE

Developing a purpose driven organization takes intentional planning and continued focus to achieve. These are a few of the ways we help our clients ask the "right" questions:

- Assessing business health
- Defining mission, vision, and core values
- Creating covenantal culture

Business Consulting

- Developing a clear organizational structure
- Implementing leadership clarity
- Defining relational clarity
- Building business generosity plans

We ask the following questions to help our clients determine their purpose:

- WHY was the company created?
- WHAT are you doing with what you have been given?
- HOW are you building a business bigger than you?
- WHO is being developed to replace you?

ENHANCING VALUE

Once a business owner has determined the company's purpose, we have several offerings to assist with increasing the company's influence, such as:

- Applying principles to improve enterprise value
- Enhancing the corporate culture
- Conducting strategic planning
- Developing healthy leadership teams
- Cultivating a leadership development culture
- Implementing and facilitating corporate governance

We ask the following questions to help our clients enhance their value:

- Are your people THRIVING?
- Are you focusing on IMPACT?
- Are you mitigating RISKS?

PRESERVING LEGACY

The process to effectively sustain the company's impact beyond the current owners should focus on the financial, social, and spiritual issues associated with the business. For internal transition plans, we can provide the following services:

- Developing collective aspirations for the future
- Preparing financial forecasts to determine the viability of an internal transfer
- Conducting continuity planning
- Preparing and equipping next generation family members (or key leaders)
- Aligning the interests of key stakeholders
- Facilitating the integration of corporate and personal legal documents

For external transition plans, our advice can include:

- Partnership dispute resolution
- Sell-side marketing
- Evaluating and negotiating third party offers and private company investments
- Managing the due diligence process
- Negotiating definitive agreements
- Managing post-closing items
- Integrating corporate cultures

We ask the following questions to help our clients preserve their legacy:

- What happens IF ...?
- What happens WHEN ...?

for more information visit:

WISDOMFORBUSINESS.NET OR RONBLUE.COM/CLIENT-DIVISIONS/BUSINESS-CONSULTING

Ronald Blue Trust advisors apply biblical wisdom and technical expertise to help clients make wise financial decisions to experience clarity and confidence and leave a lasting legacy. With nearly $13 billion in assets under advisement and a nationwide network of 16 offices, we offer comprehensive financial services and objective advice to more than 9,500 clients across the wealth spectrum in all 50 states. (as of 12/31/22 and subject to change)

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