Planning for Life Beyond Your Business

After all the hard work and risk you have taken to build your business, you need to be rewarded. Accomplishing the right exit strategy, and having the proper succession and transition planning can secure your life beyond your business. Bruderman Brothers can guide you throughout the way.

Are You Secured?

- ***Family Wealth Planning***
  Most owners don't consider post-business sale planning until it's too late. Prepare yourself and future generations by maximizing your wealth with an expertly-curated plan to preserve and grow your assets.

- ***Coordination of Estate with Outside Counsel***
  A wealth plan is only as effective as the team that executes it. Surround yourself with the right people to execute your plan so that your short and long term goals are met.

- ***Tax Consequences of a Transaction***
  It's not what you make, it's what you keep that matters. The right advisor will help you to mitigate your income tax consequences and reduce your estate tax liabilities while boosting post-transaction cash flow.

- ***Optimal Transaction Structure***
  Recognizing the transaction objectives with the associated pros and cons determines the appropriate transaction structure. Determining an optimal structure is a complex process with multiple considerations.

- ***Outsourced Family Office Services***
  Whether single family office or multi-family office, outsourcing private wealth management services to a dedicated and experienced organization saves costs and time, providing you the freedom to choose how you want to spend your personal time.

- ***Hiring the Right Financial Advisor***
  Finding a qualified and experienced advisor that can handle ALL aspects of your financial well-being is paramount. At Bruderman Brothers, we offer a complete solution to your financial needs and can show you the right path to securing your future.

Introduction to Bruderman Brothers

Who We Are

Bruderman & Co. is a multi-generational, privately held financial services holding company committed to providing its clients with the highest level of service

- Registered Broker Dealer
- Registered Investment Advisor
- Investment Bank
- Merchant Bank
- Insurance

- **Trusted** Long Term Advisor to Family Businesses
- Advising Clients **Since 1879**
- **Professional** Owners and Operators
- Create **Bespoke** Processes for Clients
- Offering A **Holistic** Solution
- **Success Driven** Mindset and Approach

What We Do

Bruderman Brothers is an independent, privately-owned investment bank that serves a diverse clientele and offers a comprehensive approach to advisory services

Bruderman & Co.

- **Private Wealth Management*** ***(Bruderman Asset Management)***
- **Investment Banking*** ***(Bruderman Brothers)***
- **Merchant Banking** ***(Bruderman Enterprises)***

Services

- Strategic Advisory (Sell-side/Buy-side)
- Capital Raising
- Strategic Consulting
- Leadership Recruiting
- Personal Transaction Planning

Our Approach

We strive to accomplish an outcome that is best for a business and its stakeholders. With the vast transactional and operating experience of our senior bankers, we know well that one size does not fit all and understand situation specific factors that motivate and drive our clients to engage in a transaction. We satisfy the needs of ultra-high-net-worth individuals and closely held businesses, offering trusted advice drawn from generations of experience.

Contact us

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* Bruderman Brothers LLC is a FINRA registered broker dealer. Additional information available at https://brokercheck.finra.org. Bruderman Asset Management LLC is a registered investment advisor registered with the United States Securities and Exchange Commission. Additional information available at https://www.adviserinfo.sec.gov/.

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