



Discover Quest's tailored packages to empower your business's growth and legacy planning.

QUEST

Advisory | Business Succession | M&A

Exploring Quest's Packages for Business Growth and Transition Strategies

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Introduction to Quest's Packages

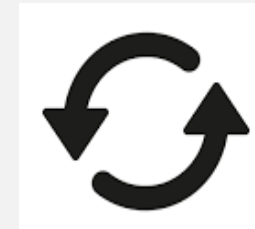
Exploring Comprehensive Solutions for Business Growth and Transition

EXPLORE with our Planners – Access strengths



GROW with our CFOs – Optimal growth strategies

CHANGE with our M&A Team – Transition Planning



LEGACY – Securing your future with our Chief “Family” Offices

EXPLORE with our Planners: Detailed Analysis

Access your Strengths

In our **EXPLORE** package, we get to know you, your business, and your ultimate goals. We utilize our best thinking and innovative technologies to provide insight into the health of your business and reveal opportunities for growth.

1. Assess business valuation and real estate estimates for a precise worth assessment.
2. Understanding marketability factors.
3. Identify clear business objectives and succession planning for a seamless transition.
4. Evaluating exit options.
5. Thorough net worth analysis.
6. Conduct business benchmarking and debt access analysis to gauge market readiness.
7. Documenting personal and business goals.
8. Prioritize exit strategies based on personal and business objectives to maximize outcomes.

GROW with our CFOs

Achieve Your Optimal State through Strategic Transition Support

Our **GROW** package is designed to help business owners achieve optimal growth in preparation for eventual transition.

Our CFO and client service team will work closely with you to continuously deliver observations, recommendations, and a path forward. Offerings to protect your company in uncertain times include:

1. Execution of discoveries
2. Industry reporting
3. Market Test

Analysis of existing systems and processes, and planning execution of projects that will contribute to growth and enhance the value of the business.

1. Employer incentive plans
2. Revenue enhancement strategies
3. Debt restructuring
4. Forecasting and budgeting
5. Capital search and speed of cash

CHANGE with our M&A Team

Embrace the next step for your business transition

Our **CHANGE** package is designed for the business owner who is ready for the next phase of life. Now that the enterprise development plans are complete and the environment is favorable.

What is included in the package:

- Execution of discoveries made during explore and grow stages.
- In-depth analysis of the exit options and future ownership options that make sense for your business and future plans.
 - a) Employees/ESOP
 - b) Family
 - c) Third-party options
- Coordination with your estate, family and tax planning.
- Full management of the competitive exit process:
 - a) Family office coordination
 - b) Targeted buyer outreach
 - c) Negotiation and analysis of offers
 - d) Facilitation of structure and tax advisory support
 - e) Creation of marketing and offerings

Create your LEGACY with our Chief "Family" Officers

Achieve financial and lifestyle goals with comprehensive strategies

Our LEGACY package protects all you have built and ensures you move confidentially and excitedly into the next phase of life.

For the retiring business Owner who decides to continue investing in private businesses as well for the business owner who doesn't need to sell their business.

The legacy package provides:

- Family office management in coordination with other advisors
- Leading of buy-side M&A strategy to further the growth of the exiting business
- Estate, family, risk mitigation, and income tax planning to generate, maintain, and preserve family wealth
- Management of existing private business investments
- Post-transition support of legacy business interests
- A private equity platform to invest in or buy businesses for your family
- Business continuation and internal succession strategies to support the family, key employees, and business goals
- Organization of charitable platforms to achieve philanthropic goals

All Team Members -

Quest's Support Team

Expertise in Business Growth and Transition Strategies



All Team Members -

Quest's Support Team

Expertise in Business Growth and Transition Strategies



Controller and Accounting Services

Key Controllers Driving Business Growth and Transitions



Celeste Rita Baker

Experienced and detailed-oriented bookkeeper and accounting professional with 20+ years of expertise.

Jen Kelly

Focused on Non-profit sectors, ensuring compliance and transparency.

Alex Kleinert

Manufacturing and Distribution controller, enhancing inventory control.

Christine Burke

Expert in Manufacturing and Distribution, enhancing operational efficiency.

Jennifer Killman

Leads in Manufacturing and Distribution, optimizing cost management.

Jerome Shepard

Specializes in Telecommunications, SaaS, and Environment Services

Georgia Hodge

Specializes in Real Estate, providing strategic financial insights.

Lisa MacDonald

Retail and Distribution expert, driving revenue growth through analytics.

Anna Styrzynska

Specializes in Distribution and Construction, managing financial risks.

The mission of Make An Impact Foundation is to promote the education and well-being of children by identifying those in severe need (homeless, poverty, etc.) as well as those with learning needs, emotional needs, disabilities or disease and creating an opportunity to produce change in their lives. Our vision at MAIF is to meet the needs of children by identifying worthwhile projects and finding donor partners to help meet each need.

Make An Impact Foundation, our partner nonprofit organization that helps Quest execute projects in the community that help children and family in need through their My Corporate impact platform. Visit their website www.makeanimpactnow.org to learn more.



Deborah McKee
Director of Impact Operations



Ali Verlander
Director of Impact Development