



The C12 Business as a Ministry capital platform

Trelus Transition Readiness Webinar Series Videos

2021

The real way companies are valued—and how to improve your company's value

Michael Jacobs

<https://vimeo.com/498440325/e81199c135>

What My Family Wished I Knew Before Selling My Business

Eric Dunavant, Pardiem

<https://vimeo.com/508143362/61d3c67aa7>

The Sellers Journey: Navigating the emotional journey of Selling

Curt Cyliax, Strategic Exit Advisors with Denise Logan, Chase What Matters

<https://vimeo.com/519178287/8f48564fbd>

How can you trust who to sell your company to and why it matters?

Michael Arrieta, Garden City

<https://vimeo.com/534295589/1fc6ec9587>

How to Sell Your Business by Building an Ownership Ladder

Bill Heestand

<https://vimeo.com/547506386/eca64b67eb>

ELIMINATING THE GAP: 10 Value Drivers to Grow Your Business

Peter Racen, Racen Wealth Management and Laura Burkemper, The Catalyst Center

<https://vimeo.com/558190201/e62520bf5d>

How do I prepare my people for an exit?

Brandt Handley, ROI Executive Search

<https://vimeo.com/566166410/1298eed488>

Increasing the value of your business by accelerating your customer's buying journey.

David Meyer, Spoke Marketing

<https://vimeo.com/572258226/b88cce0c8a>

Navigating the Messy Middle

Clint Fiore, Texas Business Buyers

<https://vimeo.com/578263892/fac4adeec3>

10 Business Ratios any Business Owner Should Know

Terry Lammers, Innovative Business Advisors

<https://vimeo.com/583055829/cba9a2d4a1>

Pre-Transaction Planning

Scott Wood, True North Advisors

<https://vimeo.com/588046853/c4b92a5f40>

Sell-Side M&A Preparation's Missing Ingredient

Hagen Rogers, Watermark Advisors

<https://vimeo.com/597866470/ae3cab0c7e>



Navigating the S-Curve to Enhance Your Business Multiple to Achieve the Desired Exit Transaction with no Regrets

Matt Gilbert, GaP Advisors

<https://vimeo.com/625703986/70d38da05a>

The Generous Business: How Families are Using their Business as an Engine for Generosity

Jeanne McMains, National Christian Foundation

<https://vimeo.com/642066319/2935714495>

The Ups and Downs of a Transaction

William Norvell

Link coming soon.

2020

Wealth Giving Strategies Every Business Owner Should Know

Layne Hoeckema, Ron Blue Trust and Michael King, National Christian Foundation

<https://vimeo.com/383881078>

How Much is Your Business Worth? How to Value Your Business

Clint Fiore, Texas Business Buyers

<https://vimeo.com/391243947/8edc38e2a5>

Stewardship of Your Business Legacy

Jeff Rogers, Stewardship Legacy Coaching

<https://vimeo.com/395535691/7c30d5ae47>

7 Steps to A Successful Exit

Curt Cyliax, Strategic Exit Advisors

<https://vimeo.com/403070756/08a00a6441>

Business Owners in Transition

Jeff Thomas, Archetype Wealth Partners

<https://vimeo.com/415668850/cded49741a>

Finish Big: How Great Entrepreneurs Exit Their Companies on Top

Dr. Allie Taylor with Bo Burlingham

<https://vimeo.com/426017539/113cf697c8>

Learn the Industry Terms: Selling your Business 101

Clint Park, Ronald Blue Trust

<https://vimeo.com/434870579/87d7660334>

4 Steps to Follow to Transition Well

Jim Nooney, Nooney Controls and Steve Hayes, The Human Capital Group

<https://vimeo.com/445579163/454d492304>

3 Steps to Making Your Business Bankable

Hagen Rogers, Watermark Advisors

<https://vimeo.com/454868026>

The Documents you Need to Sell Your Business

Ben Keller

<https://vimeo.com/467537102/d0cf44889d>

5 Ways to Improve Your Valuation

John Kelly

<https://vimeo.com/475954586/598e2cb7e8>



How to Lockdown Capital Gains Rates Through An ESOP

Brandt Brereton, Brereton-Hanley

<https://vimeo.com/481457592/61ca354132>

Systematizing Corporate Giving

Lindsay Matush of Vario Consulting

<https://vimeo.com/486542236/7471e383cf>

2020 Lunch With Leaders

Navigating Uncertainty: Battle Tested Advice in Uncertain Times

Peer Advisors: Dennis Cagan & Kevin Arner

<https://vimeo.com/408512679/39b0671711>

Lending/Liquidity Options: Sources of Capital in the New Reality

Steve Denny, Brent Burgess, Will Davis

<https://vimeo.com/413627381/b8bc368aa2>

M&A Outlook in the New Reality

Hagen Rogers, Watermark Advisors and Michael Jacobs, Jacobs Capital

<https://vimeo.com/418501662>

Navigating Uncertainty: Battle Tested Advice in Uncertain Times

Dave Dunkel, Kforce Michael Blatz, VIP Cinema Seating

<https://vimeo.com/422927212/1b95c93b4d>

Lending/Liquidity Options: Sources of Capital in the New Reality

Doug McDonald and Brant Frost IV

<https://vimeo.com/427534056/1a17cb0632>

M&A Outlook in the New Reality

Brandt Brereton and Andy Limes

<https://vimeo.com/432659586/74201b289c>

2019

Selling your Business 101: The nuts and bolts of process, language, and org structures

Andy Limes, SDR Ventures

<https://vimeo.com/312645654/375ccb47f4>

Demystifying Private Equity

Adam Code, Promus Equity; Martin Myers - Trelus; Luke Roush - Sovereign Capital; William Norvell - Sovereign Capital; Dr. Allie Taylor (Moderator)

<https://vimeo.com/316173072>

Boards: Advisory, Fiduciary, and Governance

Dennis Cagan, Caganco, Inc,

<https://vimeo.com/322121282/d80575555b>

The Art and Science of Courting Investors

Jim Millar, CVG Advisors and Andrew Clark, Wherewithal.co

<https://vimeo.com/328632613/0e43921016>

Ongoing Stewardship Strategies: The responsible transfer of MOM (Management, Ownership, & Money)

Michael King - NCF Giving and Clint Park, Ron Blue Trust with Dr. Allie Taylor, OrangeKiwi

<https://vimeo.com/340539162>



Building the S.M.A.R.T. Transition Team (Replay)

Dr. Allie Taylor, OrangeKiwi

<https://vimeo.com/306088868/51a8aeda43>

Ups & Downs of ESOP: Come explore the pros and cons of ESOP

Brandt Brereton, Brereton-Hanley, Tom Mallon (C12 member sold to ESOP) and Kris den Besten (C12 member sold to ESOP)

<https://vimeo.com/353261200/4791473a5d>

3 Things you should know about Family Succession Planning

Dr. Allie Taylor, OrangeKiwi (Moderator) and Chris Seeger and Travis Seeger

<https://vimeo.com/358132138/7fb56fdffd>

Transition & People: The Soft Stuff is Hard

Amy Gwin

<https://vimeo.com/371157585/de7e4acb36>

"I don't know what I don't know"- 15 Things Your Advisors Want you to Know

Dr. Allie Taylor, Peter Racen, Michael Jacobs, Daniel Sohn and Joel Crouch

<https://vimeo.com/371744061/5a045f68f5>

Death is a VALID Exit Strategy - How to Protect Your Family

Dr. Allie Taylor and Eric Dunavant, Paradiem

<https://vimeo.com/377600912/613ccd7d6c>

2018

Building the S.M.A.R.T. Transition Team

Allie Taylor, OrangeKiwi

<https://vimeo.com/306088868/51a8aeda43>

Scaling Up: Deciding Between Growing Organically or Taking Growth Capital

Andy Limes, SDR Ventures, Bill Blezard, Packaging Technology Group, Dr. Allie Taylor, Orange Kiwi and Martin Myers, Trelus

<https://vimeo.com/306236659/d3725484b5>

