

# 1. FOUNDATION

# 2. PREPARATION

# 3. DEEP WEALTH



# The Deep Wealth 9-Step Roadmap

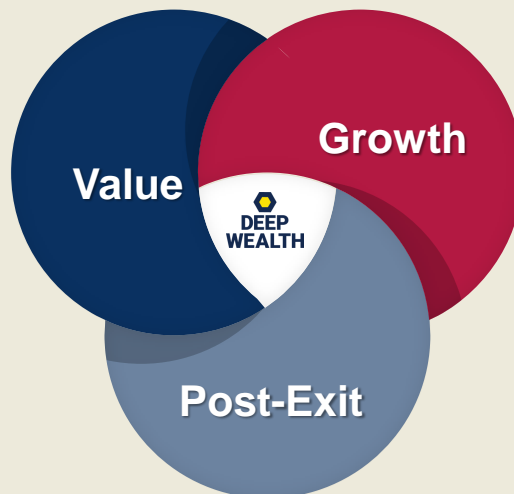


I thought I would leverage Deep Wealth Mastery for my liquidity event. I now know that the system helps me grow my business and increase its value today for a more successful future exit.

- Rachael A., Business Owner

Anybody who doesn't go through Deep Wealth Mastery will lose millions. We've received a ROI of a hundred times from the Deep Wealth system.

- Lyn M., Business Owner



The Deep Wealth system lowers my stress level and significantly cuts down on OPEX, so we can focus on growth with ease. This is the BEST system that I have ever used. Thanks so much!

- Kam H., Business Owner

Deep Wealth prevented me from making the biggest mistakes of my career. I would have short-changed my hard work and future. Thank you, Deep Wealth, for tilting the playing field to my advantage.


- Anuj J., Business Owner

# DEEP WEALTH

## Step 1 Big Picture

### Grow Enterprise Value

  
Identify Inflection Point Skeletons

  
Identify Inflection Point Rembrandts

  
Strategies to Eliminate Inflection Point "Deal Killers"

  
Strategies to Remove Skeletons

  
How to Display Rembrandts

  
How to Create a Compelling Narrative For Prospects

  
How to Create a Compelling Narrative For Buyers

### Grow Profits

  
Understanding Inflection Points

  
How to Spot Inflection Points

  
Leveraging Inflection Points for Success

  
Removing Inflection Point "Business Killers"


  
Identifying If You're in a Blue or Red Ocean

  
How to Create a Winning Business Model

  
Five Strategies to Grow Profits

### Optimize Post-exit Life

  
Lessons from the Trenches for Your Success


  
The Timeline for Liquidity Event Formula

  
Strategies to Increase Value for Financial Freedom

  
Protect Your Business from Going Out of Business

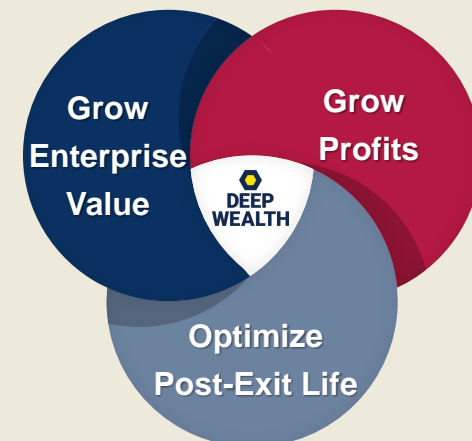
  
Find and Remove Personal Inflection Points

  
Strategies for Doing More with Less

  
Ensuring the Business is the Victor and Not the Victim

A company that is attractive to sell is also a great one to own. The Deep Wealth Mastery program gives me the best of all worlds.

- William S., Business Owner



## Grow Enterprise Value



Why X-Factors Increase Profits



A World Class Management Team



The Power Of A Blue Ocean



The Four Points Of Clarity



The Holy Grail Of Business Models



The Magic Wand Question



Identifying Existing X-Factors



Identify Hidden X-Factors



Creating an X-Factor Narrative for Clients



Creating Your Wheel of X-Factors

## Grow Profits



How X-Factors Increase Value



How To Apply X-Factors for Your Liquidity Event



Management Team Strategies



The Power Of A Blue Ocean for your Deal



Four Points of Clarity Implementation



Creating an X-Factor Narrative for your Liquidity Event



Strategies To Competitor Proof Your Business



The X-Factor Multiplier to Increase Enterprise Value



Creating The "Holy Grail" Of Business Models



Strategies To Optimize X-Factors

## Optimize Post-exit Life



Why Your Business Must Run Without you



Creating a New Daily Rhythm



Working on the Business Instead of in the Business



Strategies to Leverage your Free Time



Applying X-Factors for your Personal Life



Avoiding the Fatal Mistake Most Business Owners Make



What You Must Achieve Before your Liquidity Event



How to Enjoy a Premium for your Liquidity Event



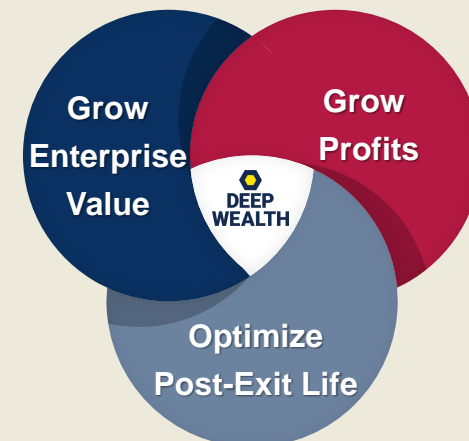
Clarity Through Knowing what you Don't Want



Revealing why the Experts are Wrong

It's not as hard as you think it is to find the time for the Deep Wealth program. If you're on the fence about the Deep Wealth program, do it, you won't regret it otherwise you'll leave a significant amount of money on the table.

- Sanjay S., Business Owner



# DEEP WEALTH

## Step 3 Future Buyer

### Grow Enterprise Value



The Art & Science of Narratives



Formula To Create A Compelling Client Narrative



How to Leverage Narratives for Higher Profits



Embedding Story Telling Into Your Culture



Leveraging the Power of Emotions



Strategies to Understand the "Why" for Problems



Mastering the Art of Thinking Like a Buyer



Strategies to Understand Buyers and their Problems



Formula To Create A Compelling Buyer Narrative



The Science On why Narratives Increase Value



Strategies To Reveal The Actual Decision Maker



How To Identify The Best Buyer



Creating Deal Points and No-Fly Zones



Strategies to Help Create your Legacy



How to Capture the Best Deal



Dispelling Myths That Take Your Time and Money



Creating your Risk Tolerance for Buyer Payment Options

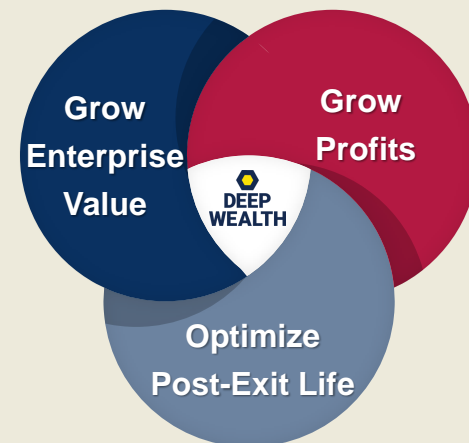


How to Protect your Post-Exit Life

### Optimize Post-exit Life










I've had transaction experience coming into the Deep Wealth program. What I've learned and the strategic insights I've gained has forever changed how I run my business. The workbooks are world-class and had connect the dots that changed for the better the trajectory of my business.

- Leon G., Business Owner








# Step 4 Due Diligence










## Grow Enterprise Value

 Timing On When To Hire Advisors	 When and How to Select Key Employees	 Leveraging the Internal Audit For Profits	 Wealth Planning	 Tax Planning	 Uncovering Additional X-Factors	 Uncovering Additional Rembrandts	 Launch Plan to Create Raving Fans	 Launch Plan to Create Higher Profits
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## Grow Profits

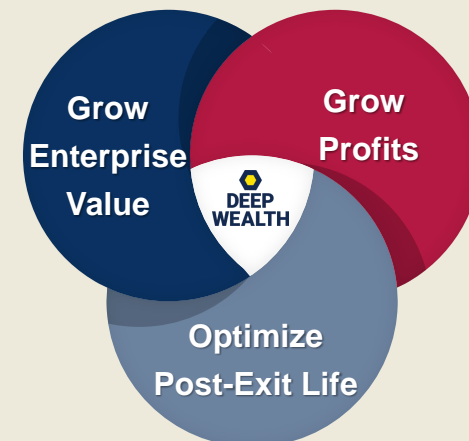
 Deep Wealth 272 Point Due Diligence Checklist	 Tax Planning	 EBITDA Adjustments	 Data Privacy Audit	 Audited Statements	 Quality of Earnings Report	 Dealing with Skeletons	 Formula to Create a Compelling Skeleton Narrative	 Formula to Create a Compelling Data Privacy Narrative
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## Optimize Post-exit Life

 Estate Planning	 Saving your Time, Money, and Health	 How to Prevent Losing the Deal	 Liquidity Event Time Formula	 Strategies to Increase Deal Certainty	 Mastering the "Magic Penny" Strategy	 Leveraging the Fabulous Five	 Why your Health is your First Wealth	 How to Minimize Time In Market
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“The Deep Wealth Mastery program helped me create the right mindset for both growing my business, and later, for my future exit. I now know what questions to ask, what to do, and not do which is priceless. Myself and the team have found dangerous skeletons and gaps that we’re now addressing as a result of the Deep Wealth program. Our actions today have a massive ROI going forward.

- Emre S., Business Owner”





## Step 5 Winning Mindset


### Grow Enterprise Value

  
The Power of  
WII.FM for  
Clients

  
Embedding A  
Winning Mindset  
In your Culture

  
Winning Mindset  
Strategies for  
your Team


  
Strategies to  
Master the Art of  
Business


  
Winning Mindset  
Formula to Create  
Raving Fans


  
The Science  
Behind a  
Winning Mindset

  
A Mindset  
for Rapid  
Execution

### Grow Profits


  
Your Winning  
Mindset and  
Role

  
Formula to Create  
a Winning Mindset  
for Employees

  
Formula to Create  
a Winning Mindset  
for Advisors

  
Formula to Create  
a Winning Mindset  
for Buyers


  
Strategies to  
Create Trust  
with Buyers


  
The DNA of  
an NDA and  
LOI


  
Strategies to  
Rise Above  
Deal Fatigue

### Optimize Post-exit Life


  
How to  
Identify Key  
Employees


  
Strategies to  
Manage your  
Team's Mindset

  
Deal Points  
and No-Fly  
Zones for Each  
Key Employee

  
Strategies that Help  
Key Employees  
Unleash Success

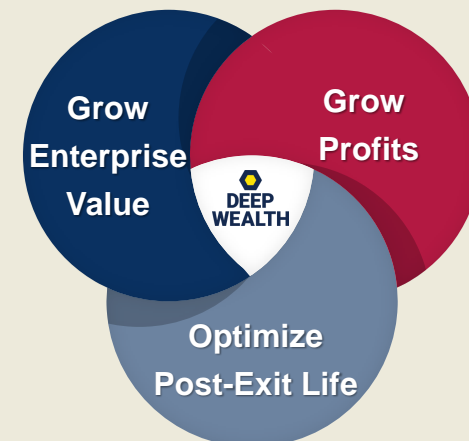
  
Strategies to  
Reduce the Due  
Diligence Time  
Period

  
Creating the  
"Why" for your  
Liquididy Event

  
Letter from  
your Future  
Self









“The most powerful and incredible thing about the Deep Wealth Mastery program is that I was able to apply the strategies immediately. I learned so many major levers in the program that my business improved by an order of magnitude. Thank you, Deep Wealth!”

- Bruce W., Business Owner”







# Step 6 Advisory Team

## Grow Enterprise Value

							
Understanding the Role For Each Advisor	Where to Find the Best Business Advisors	Finding the Ideal Wealth Advisor	Finding the Ideal Tax Advisor	Strategies to Create Powerful Advisor Narratives	The "Timeliness" Strategy	Mastering the Business Advisor Scorecard	The One Question to Ask Before Hiring a Business Advisor

## Grow Profits

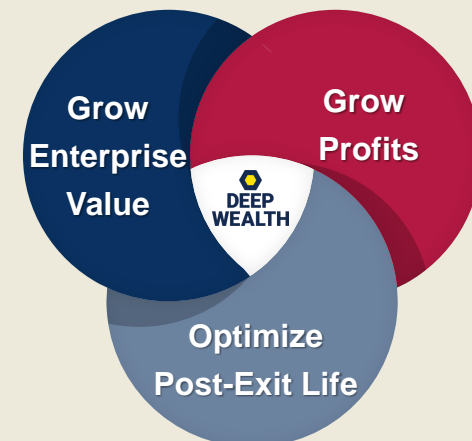
							
Understanding Which Advisors you Need and When	Where to find the Best Advisors M&A Advisors	Finding the Ideal Investment Banker	Finding the Ideal M&A Lawyer	Finding the Ideal QoE Advisor	Strategies To Create Compelling Advisor Narratives	Mastering The M&A Advisor Scorecard	The One Question to Ask Before Hiring an M&A Advisor

## Optimize Post-exit Life

							
Strategies to Leverage your Leadership Team	Strategies to Leverage your Network	Finding the Ideal Wealth Advisor	Why and how to be the World's Best Client	Strategize to Minimize Fatal Mistakes	Avoiding the "Let's Get It Done" Syndrome	Investment Banker Compensation for a Larger Deal	How to Change the Social Fabric of Society

“One of the most difficult things in business is preparing for success. Thanks to the Deep Wealth Mastery program, I anticipate success instead of emotionally preparing myself for failure. The Deep Wealth community has helped me extract my deep wealth and adds tremendous value.

- Jack M., Business Owner”





## Step 7 Timing & Execution

### Grow Enterprise Value

The Goldilocks Communication Scenario	How to Ensure Employees Stay	Strategies for Client Change Management	Strategies for Employee Change Management	Creating A Communication Plan For Stakeholders	Strategies to Ensure Clients Stay Onboard	Leveraging the Fabulous Four	Strategies for a Winning Mindset

### Grow Profits

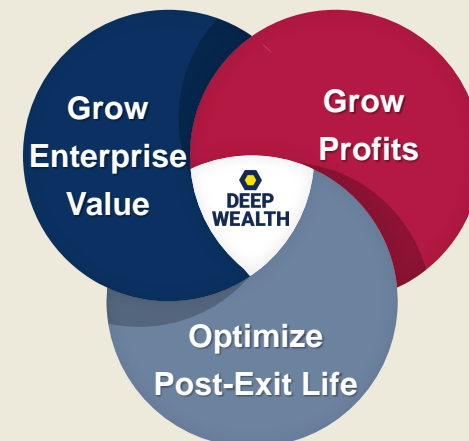
The Liquidity Event Life Cycle	Winning Communication Characteristics to Master	Fatal Mistakes to Avoid when Transitioning	Strategies to Create Compelling Employee Narratives	How to Create your Communication Plan	Post-Closing Questions that Win	Post-Closing Answers that Win	Winning Strategies from The Trenches

### Optimize Post-exit Life

Creating a Winning Narrative for Employees	Avoiding Penalties from your Reps and Warranties	How to keep your Escrow Funds Intact	Understanding when the Deal is Really Done	Lessons From the Trenches to Protect your Legacy	Knowing what you want and don't want	Understanding your role and timing	Your transition communication

“The investment I made in the Deep Wealth program is a rounding error compared to the value created today and the future value I'll receive.”

- Sanjay S., Business Owner



# Step 8 Skeletons and Rembrandts

## Grow Enterprise Value

The Deep Wealth 9-2 Effect to Increase Profits

How to Find and Remove Silent "Business Killers"

Eliminating Skeletons Lowering Profits

Strategies to Optimize Rembrandt Narratives

Creating a Brand Promise that Grows Profits

The Science Behind Narratives

The Overall Mission to Achieve

## Grow Profits

Eliminating Skeletons that Lose or Lower Enterprise Value

Effectively Executing All the Strategies and Tactics

The Science Behind Narratives that Increase Enterprise Value

How to Welcome Clarity and Peace of Mind

Identifying and Removing your Most Dangerous Skeleton

Identifying and Displaying your Most Valuable Rembrandt

Leveraging AI for Your Narratives

## Optimize Post-exit Life

Avoid the "Either or" Scenario to Optimize Happiness

The "Why" Behind Preparation

Strategies to Stop Believing and Start Knowing

Strategies to Welcome Clarity and Peace of Mind

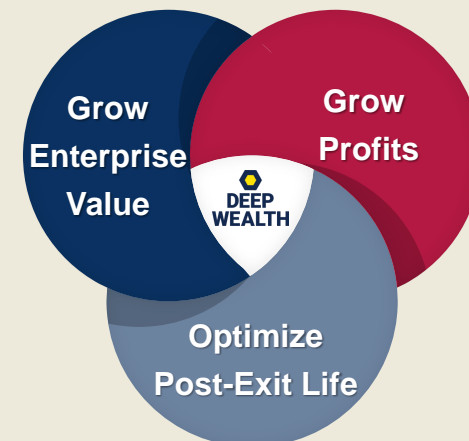
The ROI from Preparation

How to not Gamble With your Financial Future

Leveraging the PIPO Strategy

Hands down, Deep Wealth Mastery is the best program I've ever participated in. And we've done a lot of different things over the years. We've been in other mastermind groups, gone to many seminars, workshops, conferences, retreats, and read books. The Deep Wealth program was so different. I haven't had an experience that's anything close to Deep Wealth Mastery in all the years we've been there. It's five-star, A-plus.

- Sharon S., Business Owner



## Step 9 Launch Plans

### Grow Enterprise Value

Strategies to Grow Profits

Strategies to Create Market Disruptions

Crafting the Holy Grail of Business Models

Strategies to Save Your Health, Time, And Money

Strategies to Optimize Business Culture for Growth

### Grow Profits

Launch Plans to Capture the Best Deal Instead of Any Deal

How to Tilt the M&A Playing Field to Your Advantage

Strategies to Create Certainty and Peace of Mind

Strategies that Minimize Time in Market

How to Capture the Best Deal Over any Deal

### Optimize Post-exit Life

Why Launch Plans Unlock Growth and Value

Launch Plans to Optimize Post-Exit Life for Happiness

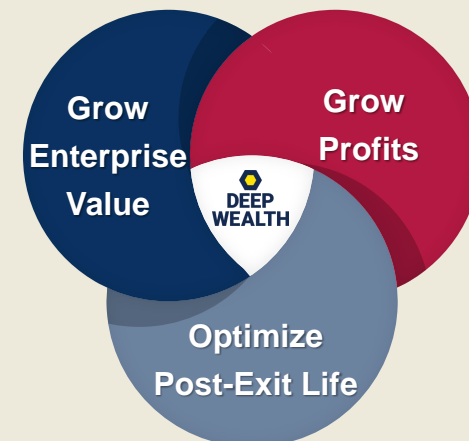
Launch Plans to Create a Legacy for Joy and Fulfillment

Strategies to Avoid Fatal Post-Exit Mistakes

Launch Plans to Enhance Your Health and Wealth

“The investment of time and effort into my business from the Deep Wealth Mastery program has translated into a better company and has helped everyone be aligned on the same page. My company is more organized, and when and if I want to exit I’m confident we can get maximum value.

- Sol O., Business Owner



# DEEP WEALTH

## Your Post-Exit Life

### Grow Enterprise Value



The art and science of business



Creating A new daily rhythm



How to extract your deep wealth



About the deep wealth 9-step roadmap



How to lose the golden handcuffs



The power of the deep wealth 9-step roadmap



Leveraging your deep wealth hour of power

### Grow Profits



How not to become A statistic



The power of preparation



How to structure your day for results



Finding and extracting your deep wealth



How to master something you've never done



What the statistics hide from you



How not to gamble with your financial freedom

### Optimize Post-exit Life



The power of the "Now What" question



The power of A daily rhythm for happiness



How to optimize your life for happiness



Strategies for creating fulfillment



The power of gratitude



Post-exit lessons from the trenches



Deep wealth mastery through workbooks

Compared to when we first began, today I feel better prepared, but in some respects, may be less prepared, not because of the course, but because the course brought to light so many things that I thought we were on top of that we need to fix. This course is one of the best investments you will ever make because you will get an ROI of a hundred times that. Anybody who doesn't go through it will lose millions.

- Lyn M., Business Owner

