

PICK THE PEOPLE. THEN PICK THE PATH.

Succession that holds because the bench is real.

EOT, ESOP, MBO, or family transition. Only one in three family businesses transitions cleanly to the next generation; the structure isn't usually the problem, the bench is. The hardest part isn't the financial math, it's the emotional math. Every structure works when the bench is real. We build the bench first.

FIVE SEATS BEFORE THE STRUCTURE

01 · OPERATIONS LEAD

Day-to-day execution. Runs the operating rhythm. Manages middle management. The seat that absorbs the most owner time.

03 · COMMERCIAL LEAD

Sales process, customer relationships, growth pipeline. Often the seat with the highest founder dependency.

05 · STRATEGIC LEAD

Market direction, M&A, big bets. Often the seat the owner stays in longest. Sometimes a board, sometimes an outside CEO, sometimes a successor in training.

02 · FINANCE LEAD

Financial reporting, lender relationships, capital decisions. The seat the buyer or trustee audits first.

04 · PEOPLE LEAD

Hiring, retention, culture, accountability. The seat most family-business owners under-invest in until a key person leaves.

People first. Structure second. The wrong order takes 12 to 18 months and burns more goodwill than the structure decision itself. The right order takes the same time and lands a real transition.

PICKING THE PATH

FOUR EQUITY OPTIONS.



01 PHANTOM EQUITY / SARS

Cash-out alignment for non-family key operators. No cap table changes. Tax-efficient when structured well.

03 RESTRICTED STOCK / OPTIONS

Traditional equity for S-corps and C-corps. Cap table changes. Coordinated with attorney and tax counsel.

02 PROFITS INTEREST

Real equity for LLCs. Capital gains treatment if held through a liquidity event.

04 FAMILY PATHWAYS

Clear earning structure for next-gen, with real seats and accountability before the equity vests. Pathways, not entitlements.

THE PATH IN

01

FREE

FOUNDATION CHECK

Bedrock Score on our website.
24-hour reply.

02

FREE

CORNERSTONE SESSION

30 to 60 min with both partners.
We name the binding constraint.

03

PAID

QUARRY-TO-CAPSTONE DIAGNOSTIC

Three to four weeks. Capstone Report maps the seats.

04

ENGAGE

SUCCESSION ENGAGEMENT

Bench first. Structure when ready. Coordinated with attorney + CPA.



JARED LUEGERS, CFA
FOUNDER & OPERATING PARTNER

Builder by instinct, operator by track record, investor by training. Founder of OWN Indiana. Has run operations through a \$200M strategic sale and separately helped acquire a small Indiana operating business. From Jasper, Indiana.



RYAN ANOSKEY, CPA
CFO PARTNER

Finance-first operator. 13+ years in transaction due diligence, valuation, audit, and corporate finance. 100+ Quality of Earnings engagements and valuations delivered. From Evansville, Indiana.

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