

# Intentional Perpetuation

## Creating ***YOUR*** Desired Future

Mark Gaunya, Principal, Borislow Insurance  
Founder & CEO, Captivated Health

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# Pathways for Growth

- Go it alone using retained earnings
- Sell to a long-term national brokerage firm
- Join an emerging national brokerage firm
- Take on a capital partner

# Capital Partnership – Why Now?

- Capital Market at its highest level of activity
- Ability to maintain our independence and legacy
- Achieved high marks on Capital Partnership score card
- Ownership opportunity for future leadership
- National business expansion opportunities
- Access to national resources – finance and legal
- Access to immediate M&A capital

# Pathway Selection Criteria – Who?

## Key Factors

### People

secure talented people

### Technology

embrace and maximize

### Process

streamline for efficiency

### Innovation

rapid experimentation

## Capital Partner Scorecard

- ✓ Culture Fit
- ✓ People and partners
- ✓ Alignment and vision
- ✓ Future role and involvement
- ✓ Opportunities of our team
- ✓ Intuition
- ✓ Control

# Pathway Process – How?

- Spend time thinking about your thinking
- Invest time getting educated (options, process, timeline)
- Identify strategic partner for guidance
- Identify M&A legal counsel
- Identify Tax accounting partner
- Prepare your leadership team
- Pay attention to communication and speed

# BIG Takeaways – Best Practices

- Create a vision for YOUR future FIRST – **Clarity**
- Start with WHY and WHAT to find – **WHO**
- Create your own scorecard – **Discipline**
- Assemble YOUR “deal team” – **Guidance**
- Communicate future vision – **Leadership**
- Pay attention to the details – **Integration**
- Celebrate with your team – **Capture the Moment**

# Panel Contact Information

**Brett Rosen, Principal**

**Rosen Advisory**

[brett@rosenadvisory.com](mailto:brett@rosenadvisory.com) 404-992-5541

**Mark Gaunya, Principal, Borislow Insurance**

**Founder & CEO, Captivated Health**

mark@borislow.com / Cell: 978-302-8642

**Dan Mangus, VP Growth and Development  
Senior Marketing Specialists**

[Dan.mangus@smsteam.com](mailto:Dan.mangus@smsteam.com) 573-614-2140

**Robert Tierney, Principal**

**OneDigital**

[Robert.Tierney@OneDigital.com](mailto:Robert.Tierney@OneDigital.com) 208-887-4900