BMSS Family of Companies

Sovereign's Capital

BMSS Family of Companies Presents:

BUSINESS OWNERSHIP AS STEWARDSHIP

Join us with Sovereign's Capital for a thoughtful discussion on business ownership, succession, and stewardship beyond valuation or transaction. This webinar will explore how owners can approach transition planning with intention, considering the long-term impact on employees, culture, family, and legacy while preparing thoughtfully for life after a liquidity event.

Thursday, July 9, 2026
8:30 am - 10:00 am

Register Now

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CAPITAL

FAITHFUL STEWARDSHIP

A Principled Approach to Succession, Liquidity & Values-Aligned Business Transition

Do You Believe that God Owns It All?

“The earth is the Lord’s and the fullness thereof, the world and those who dwell therein, for he has founded it upon the seas and established it upon the rivers.”

- Psalm 24:1-2

What does a faithful steward look like in business?

Business owners and leaders engage in the process of decision making based on biblical principles.

Business owners and leaders allow themselves to be held accountable.

Three Types of Mentalities

EMPLOYEE MENTALITY

Focus: Tasks & Jobs

Responsibility: “Theirs”

Perspective: Short Term

Consideration: What’s best for me

OWNERSHIP MENTALITY

Focus: Strategic / Enterprise Value

Responsibility: “Mine”

Perspective: Short & Long Term

Consideration: What’s best for the company

STEWARDSHIP MENTALITY

Focus: Health & Value Impact

Responsibility: “God’s”

Perspective: Generational

Consideration: What’s best for the Kingdom

What a Well-Prepared Transition Protects

EMPLOYEES

- Culture is preserved and carried forward
- Strong leaders are developed in every generation
- Mission and values continue beyond the founder

FAMILY

- Clear communication removes ambiguity
- Aligned expectations prevent conflict and division
- Legacy is honored and intentionally transferred

ALL STAKEHOLDERS

- Well capitalized for the next chapter
- Strategically positioned for long-term health
- Strong governance supports trusted decisions

Is Your Business Ready for Transition?

CREATING OPTIONALITY

Healthy businesses transition better than unhealthy businesses.

Valuable businesses have more options to explore.

PROTECTING YOUR IDENTITY

God has a plan for the business beyond you.

God has a plan for you beyond the business.

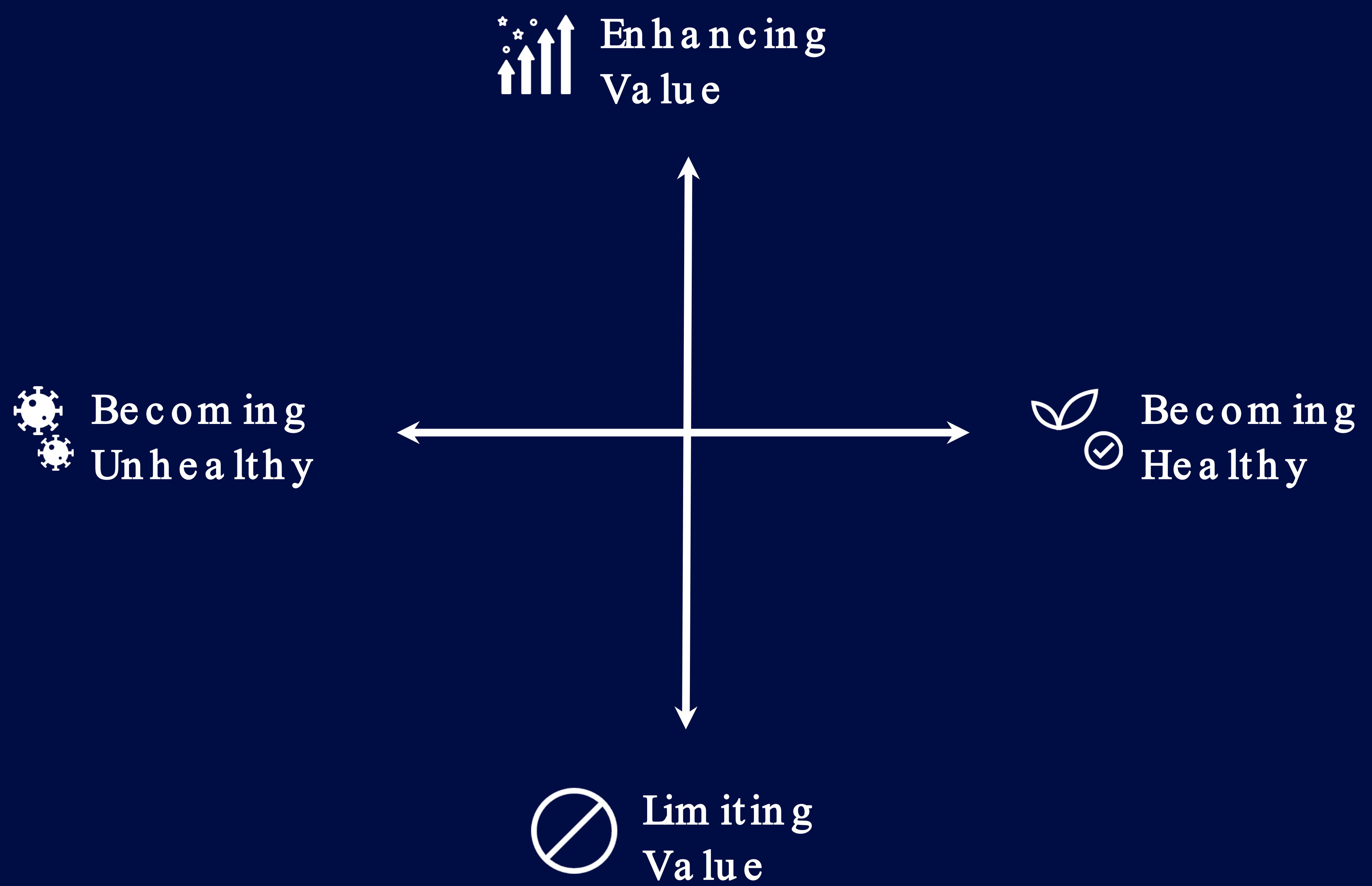
A BIBLICAL PERSPECTIVE

BOTH HEALTH & VALUE MATTER

HEALTHY COMPANIES MAXIMIZE THE KINGDOM IMPACT OF THE BUSINESS.

VALUABLE BUSINESSES MAXIMIZE THE OPTIONS AVAILABLE TO CONTINUE THEIR KINGDOM IMPACT.

WHERE IS YOUR BUSINESS ON THIS GRID?



Biblical Wisdom on Business Health

LEGACY

- Mission, Core Values, & Vision
- Corporate Culture

STEWARDSHIP

- Financial Strength
- Generational Thinking
- Relationship Capital

WISDOM

- Strategic Plan
- Governance Structure

LEADERSHIP

- Health Leadership Team
- Continuity Plans in Place
- Leadership Development Culture

Biblical Wisdom on Business Value

HUMAN PRODUCTIVITY

- Training & Development
- Enhancing Productivity
- Retaining Key Leaders
- Human Capital Scalability

INHERENT VALUE

Discipline Decision Making

- Corporate Finance (NPV)
- Strategic Decision Making Matrix
- Enterprise Value (DCF)

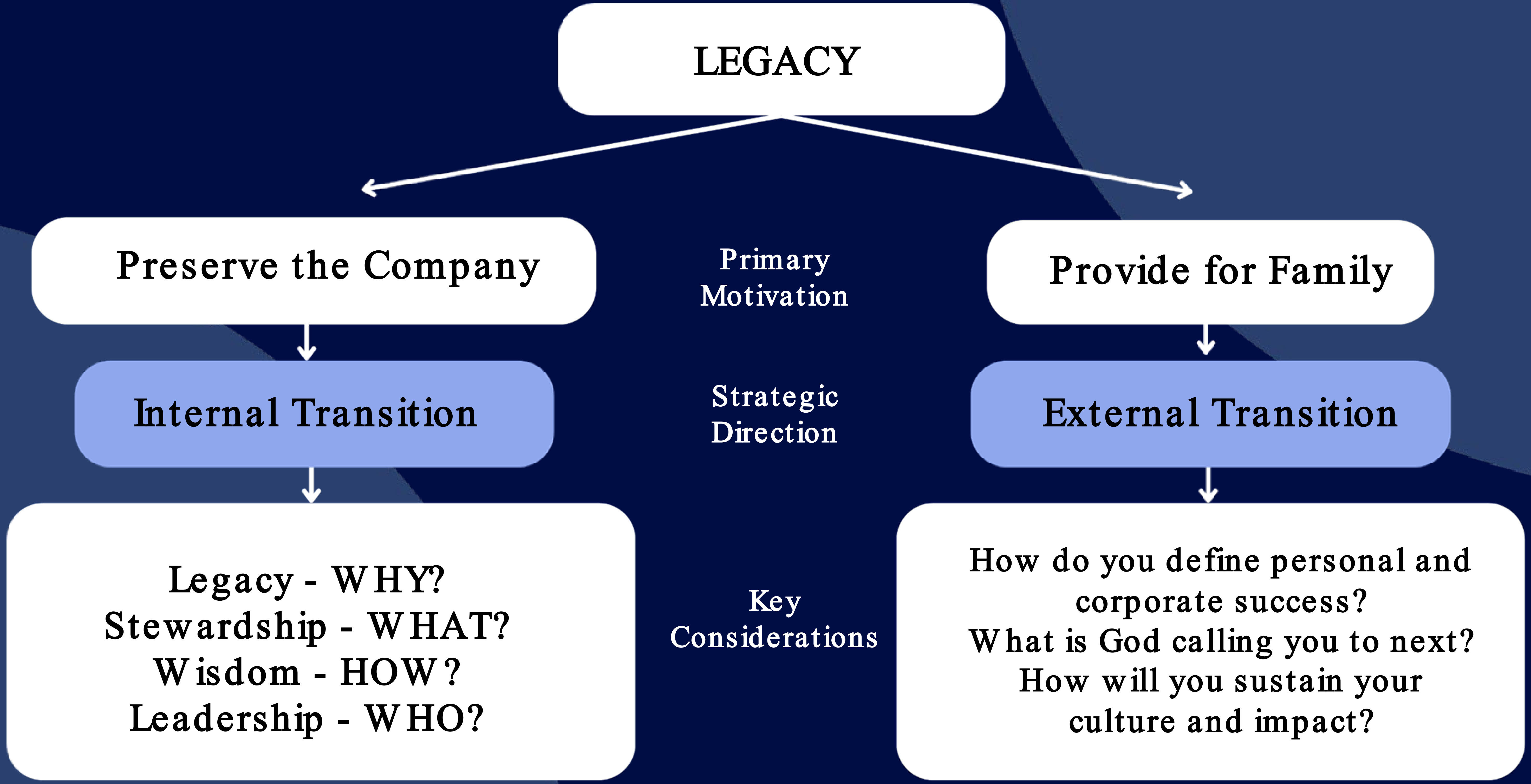
UNCERTAINTY

- Owner Independence
- Sustainable Financial Statements
- Healthy Debt Usage & Structure
- Legal Protection

INSTABILITY

- Diversified Supply Chain and Customer Base
- Revenue Model
- Customer Retention

Why Has God Entrusted the Business to You?



Forward Stewarding an External Transition

Defining A Successful Exit

Personal Success

- Determining financial goals
- Identifying spiritual or faith-based markers
- Carrying the mission forward
- Preserving the legacy
- Supporting causes you care about

Corporate Success

- Prioritizing the well-being of your employees and customers
- Defining qualities or values needed in the new owner
- Creating a positive impact for all stakeholders

Preparing for Life After the Transition

"The transition asks you to separate who you are from what you built — and to discover what God is calling you to next."

Developing A "Refiring Plan"

"God has a plan for the business beyond you, and God has a plan for you beyond the business"

Finding Like-Minded Buyers

Stewardship Mindset

- Do they recognize that God owns their business and they actively invite the Holy Spirit to guide its operations?

Committed Partnership

- Do they have a value creation methodology with a biblical worldview at its foundation?

Investment Excellence

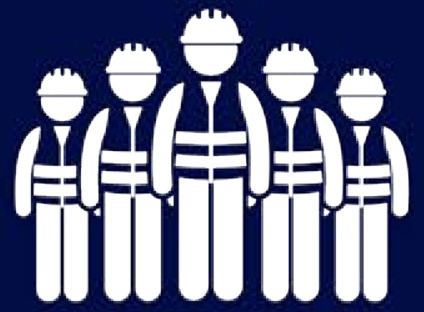
- Do they a clear process to balance Kingdom impact with financial ROI in the companies they own?

Forward Stewarding an Internal Transition

Four Main Types of Internal Forward Stewardship

Family Members

Key Leaders



Employees

Charitable Organizations

Internal Transition Process Overview

1. APPLYING BIBLICAL WISDOM
2. BUILDING YOUR TEAM
3. IDENTIFYING THE TRANSITION TIMELINE
4. DESIGNING THE OPTIMAL STRUCTURE
5. DEVELOPING THE FINANCIAL FORECAST
6. INTEGRATING LEGAL DOCUMENTS
7. FACILITATING CLEAR COMMUNICATION

Building your team

Key Characteristics

- Shared Worldview
- Ability to collaborate
- Understanding of the big picture

Core Team of Strategic Advisors

- CORPORATE ATTORNEY
- CPA
- FINANCIAL PLANNER
- TRANSITION PLANNING ADVISOR*
- CHARITABLE GIVING ADVISOR

Continuity & Succession Planning Framework

	CONTINUITY PLAN	SUCCESSION PLAN
LEGACY		
STEWARDSHIP		
WISDOM		
LEADERSHIP		

Issues to Consider

- Determining the Transition Timeline
- Developing the Financial Forecast
- Structuring the Sale
- Preparing Legal Agreements

Key Legal Documents to Review

Personal Documents

- Will
- Trusts
- Prenuptial / Postnuptial agreements

Unintended Consequences to Avoid

- Restrictions on share transfers
- Coping gaps

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Questions?

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If you have a question that you'd like to ask, please use the Q&A Button at the bottom of your screen.

CPE certificates will be issued approximately two weeks after the presentation.