



**Video transcript: “One Question: Insight into Business Transition Planning with Regions' Bryan Koepf”**

**Video source:** [YouTube](#)

**Note:** Fun, upbeat music begins to play.

**On screen:** Regions logo appears

**On screen:** Bryan Koepf appears

**[Voice-over]** Hello, I am Bryan Koepf, Wealth Planning Executive for Regions Private Wealth Management.

As a business owner, I am sure you have entered the search term “business transition or business continuation” into your favorite search engine. I am willing to bet you may have been overwhelmed by what you found. Topics such as:

- 1) Do you have a trust, and do you need one;
- 2) I can sell your business ... no questions asked;
- 3) Buy as much insurance as you can because the estate tax will bankrupt your family ...

are potential visuals you have been exposed to. Coupled with the worldwide web, you may have been actively seeking advice. You may have heard a number of solutions or ideas — which are well intended to be helpful but provide additional stress and the prospect of inertia.

My advice to you is to take a deep breath and be confident. Maybe you are a career entrepreneur, maybe a legacy business owner who has built your success on calculated risk, analytics, and what your heart and mind tell you. You’ve got this.

**On screen:** Text appears on screen that says “Focus on the “ONE” question”

**[Voice-over]** In turn, I want you to focus on “The One Question.” That question is: Do I have a business continuation plan or not? If I do, does it still meet my aspirations? If it does not, what are the basic fundamentals most important to me and my business to begin the journey?

Here is what we do know:

**On screen:** Text appears on screen that says “The 100% Rule”



**[Voice-over]** 100 percent of businesses, no matter their size or ownership structure will transition someday. I want to empower you to make the best decisions for you, your family, business, and employees. If you do not make certain decisions, they will be made for you.

**On screen:** Text appears on screen that says “It is about you”

**[Voice-over]** The one question is not truly answered if your plan does not meet your intentions. Complex does not necessarily mean best in class. Making sure you are in control and fully understand how your plan works as life events unfold is paramount to determine if your plan is truly a success.

**On screen:** Text appears on screen that says “Perfection is the enemy of excellence”

**[Voice-over]** You will not be able to please everyone with the decisions you would like to implement. You do not control what tax policy is and when the M&A markets are best to go to market, but you can strategize to put you and your business in the best position possible. A focus on excellence with continual tactical improvement allows for you to maintain flexibility and likely meet the goals you set when you started your company.

Regions looks forward to working on “the one question” with you. Our commercial banking, capital markets, and wealth management advisory partners not only have industry-leading experience in advising you on the “one question,” but to build the plan that will answer the next 100 questions you encounter.

In the weeks and months ahead, I am excited to introduce you to a number of Regions advisory and thought leaders who will provide their thoughts and guidance on how to approach your “one question.” It will also be our privilege to work with you on your business continuation plan — wherever that may take us.

Until next time, I am Bryan Koepp, wealth planning executive for Regions Private Wealth Management. And I look forward to exploring with you your answer to “the one question.”

**On screen:** Text appears on screen that says, “Talk to your Regions Wealth Advisor today” and [regions.com/wealth-management/private-wealth-management](https://regions.com/wealth-management/private-wealth-management), as well as disclosures.