BIG CANYON ADVISORS

Strategic Planning

Align your family around where the enterprise is going and create a practical roadmap for getting there.

Big Canyon Advisors runs a confidential, facilitated process that turns your long-term vision into a clear, actionable strategic plan.

When is Strategic Planning Most Valuable?

Leadership Transition

Preparing to pass the baton to the next generation.

Significant Change

Major growth, succession, or a liquidity event.

Lack of Shared Direction

Family and leadership need clearer priorities & alignment..

Time for a Refresh

Existing plan expired or no longer reflects reality.

One Vision. Three Planning Horizons



FAMILY CHARTER

50 to 100 Years Out

- Vision for the family's legacy
- Who we are & what we aspire to

STRATEGIC PLAN

5 to 10 Years Out

- Governance, succession & talent
- Investments & philanthropy

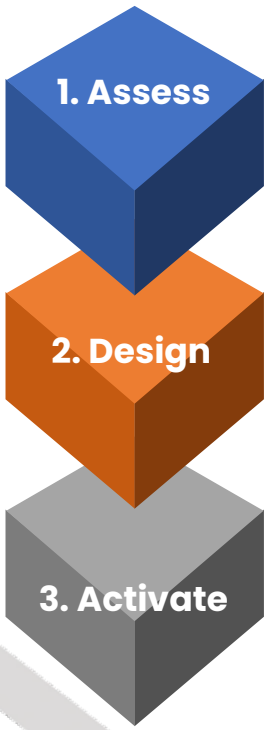
BUSINESS PLAN

1 Year Out

- Annual initiatives & budgets
- Actions pulled from the long-term plan

Our strategic planning engagement is scoped to the Strategic Plan above. Business plans and family charters are separate, related engagements.

A Facilitated Path to Decisions



Assess

Months 1-2

- Confirm scope & success measures
- Review documents & key voices
- Understand vision & challenges

Design

Months 2-6

- Define vision; destination
- Choose priorities & tradeoffs
- Sequence initiatives & owners

Activate

Months 6-8

- Assign timing & resources
- Communicate & launch the plan
- Review quarterly & adjust

What You Will Have: A Strategic Plan You Can Actually Use

A strategic plan addresses critical decisions across family governance, leadership succession, owner alignment, next-gen readiness, business growth, technology and cyber, tax considerations, and philanthropy - culminating in the takeaways below.

Clear Decision Framework

Specific 5-to-10-year goals plus principles for making decisions

Shared Direction

Aligned vision and values, and where you want to be in 5–10 years

Objective Current State Assessment

A candid assessment across the business, family office & family

Actionable Roadmap

The initiatives that bring the plan to life - each with an owner, a timeline, and a way to measure progress

Defined Strategic Priorities

Focused priorities across governance, succession, education, investments, & philanthropy

Governance & Review Process

Who's involved in shaping and approving the plan and how to keep it current with an annual review

Why Families Choose Big Canyon Advisors

Built to help families achieve their legacy for the next 100 years.

25+ Years of Focus

Exclusively serving wealth families, family businesses and family offices.

Proven Methodology

Our founder created the methodologies used at two of the Big 4 accounting firms.

Integrated Expertise

Family enterprise, family offices, governance and strategic planning.

Independent by Design

Conflict-free advice with institutional experience and boutique discretion.

Begin the Conversation

To discuss how we can support your enterprise, contact:



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