

insights

TYPES NOT MAPPED YET October 16, 2024 | TTR not mapped yet | Barry L. Fischer

Up and Downs of Rollover Stock

Here's a nice summary by my partner Nathan Viehl about the benefits and pitfalls of "rollover equity" when selling a business to a private equity firm.

Nathan notes that aligning your expectations around control, getting comfortable operating with debt, and prioritizing short-term results can help make a successful transition.

While this can be an enticing opportunity to capitalize on future growth by taking a "second bite at the apple," there are several key differences that sellers should be aware of that might change the incentive structure they have grown accustomed to in running their own founder-owned business.

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