

Client and Professional Advisor Comments

“Passing on a family business is almost more about family dynamics than economic solutions. Don’s insight into the former and expertise in the latter helped us successfully navigate a first to second generation business transition. We are now poised to pass our business to a third generation. It’s nice to work with someone who has successfully helped hundreds of families through the process.”

Bob Foster
Retired President/ *Lost Valley Ranch*
Sedalia, CO

“Don invested the time to listen and understand my complex needs, then provided creative solutions that are performing beyond the projections. True for me personally. True for our organization – as Don has structured all of our “key man” programs. I appreciate the reliable expertise and impeccable integrity. Don is personable, yet very professional.”

Bill Anderson
Retired President & CEO/ *Christian Booksellers Association*
Colorado Springs, CO

“The proof is in the results. Twenty years ago, Don See and Dave Keesling assisted in crafting the estate planning for my parents. Last year after mom’s death (and dad’s several years before), we realized that the planning that was set into motion years before provided a seamless transition, consistent with their wishes and taxless. Charity and members of the family were greatly appreciative of that advance planning when they were able to have set it into motion. Once again, many thanks!”

John Gibson
Real Estate Developer
San Diego, CA

Words cannot express how thankful we are that God divinely arranged it, so we had the opportunity to meet Don See and his staff at Pass It On, Inc. Our privately held engineering consulting business had experienced rapid growth and expansion from when we started in 2008 until now in 2018. Don was absolutely the right person to help us develop a continuation plan, and he truly understood how best to guide us into the very best plan. He also connected us with a great attorney who has put it to writing. We always felt heard and listened to throughout the process and our concerns were heard and always addressed. We right away could sense that we were in good hands. Now six years later, we have had to make revisions to our plan twice and Don and Misty have been there to support us each time without hesitation. They have become trusted advisors who are always willing to help with wise words of advice. I have called them when considering the acquisition of another business, when planning a 7-week sabbatical with my family, when in need of life insurance for my children and, more recently, to seek guidance on developing an exit strategy. Continuation and exit strategy are topics business owners usually do once in their lifetime and I am learning that most never do it. I can say with confidence that without Misty and Don, we would not have a plan either and I am so grateful for them and how they have helped us. The best part is they are great people who love the Lord, love people and are so much fun to work with!!

Joseph Hunt, PLS,PE
Owner/Founder/ *JHA Companies*
Montrose, PA

For nearly 15 years, the folks at Pass It On have counseled and created for my company and family a business succession plan that provides the best chance of Alive continuing and prospering and creates financial security and peace of mind for my family. Their plan also flexed nicely to accommodate changes in my business and personnel. My wife and I feel heard whenever we meet, and they’ve proven to be a trustworthy sounding board and source of advice.

Rick Christian
Founder CEO/*Alive Literary Agency*
Colorado Springs, CO

“While most planners focus on techniques and symptoms, Don has a remarkable ability to uncover a client’s core issues that may have stymied estate and/or business planning for years. Most often, the real issues underlying planning challenges are relational, rather than asset-based, or values-driven rather than related to mere dollars. He is a master at being able to help clients understand options available to them and the consequences of various actions that may be under consideration. Once the client has these enhanced perspectives, they can make implementation decisions much more easily.”

Dave Keesling
Principal/ *Philanthrocorp*
Colorado Springs, CO

“Running a closely-held business without the insights of Don See would not only be shortsighted and endanger the livelihood of valued employees, but virtually eliminate any hope of a lasting legacy. Don asks great questions, is a nonjudgmental listener and provides an objective point of view that’s hard for a small business owner to find these days. His impeccable integrity and real-world experience inspires me to be an equally valuable mentor for my customers.”

William D. Esteb
President./ *Patient Media, Inc.*
Palmer Lake, CO

“I’ve worked with Don on numerous large, complicated estate plans. He’s very instrumental in designing the plan and organizing how it all flows together to meet the client’s needs. I’m astounded at his knowledge in that field.”

Dennis Thomas
Attorney
Colorado Springs, CO/Little Rock, AR

As the consummate professional, Don understands the technical requirements and options of any estate plan and business succession plan. However, he also takes the time to understand each individual client’s family and business situation to make sure that the most practical and, therefore, the most successful plan is developed and implemented for the client.

John Stinar
Attorney/ *Stinar, Zendejas & Gaithe, LLC*
Colorado Springs, CO