

A CONFIDENTIAL ADVISORY BRIEF

Clarity at the intersection of family, wealth, & business.



01 Real-World Insight

02 Discreet Advisory

03 Lasting Impact

THE PRACTICE

We are executive-level operators — former CEOs, COOs, and CPAs — who have built companies, led billion-dollar organizations, and developed businesses from the ground up. We work one-on-one with families, founders, and closely-held companies on the decisions that matter most.

ADVISORY SERVICES

Four interlocking practice areas, delivered through a single point of contact.

I	Family & Legacy Advisory	Governance · Succession · Next-generation mentoring
II	Transactions & Capital	Buy-side · Sell-side · Valuation · Fundraising
III	Growth & Operations	Hiring · Cost planning · Budgeting · Scale
IV	Financial Clarity	Forecasting · Cash flow modeling · Scenarios

SELECTED ENGAGEMENTS

Representative work, anonymized. References available on request.

FAMILY & LEGACY

Succession Planning

Advised a fast-growing business owner on succession and wealth transfer; established trusts; mentored the next generation.

TRANSACTIONS

Sale of an Education Co.

Guided a national provider through preparation, valuation, and negotiations with a publicly-traded buyer.

INNOVATION

Tech Startup Pitch

Crafted messaging and investor deck with the founder; outside funding secured within three months.

FIRM PRINCIPAL



Craig Lewis

Experienced Founder, CEO & COO

EDUCATION

Georgetown
Economics
Wharton
MBA

CREDENTIALS

CA Licensed
Professional Fiduciary #1567
National Certified Guardian

SECTORS

Healthcare
Real Estate
Technology
Professional Services

Clarity begins with a conversation.

Schedule a 10-minute talk to see how we can help.

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centuryparkadvisors.com