

ARE YOU 'EXIT READY?'

To help determine if you are prepared for one of the biggest events of your life, answer the following question.

QUESTIONS	YES	NO
Objectives and Legacy Desires		
Do you know when you want to be completely out of the day to day operations?	<input type="checkbox"/>	<input type="checkbox"/>
Do you know how you would like to exit your company (even if it is 5 or 10 years from now)? • Sell to Third Party • Sell/Transfer to Family • Sell/Transfer to Employee(s) • ESOP • Manage for Life • Liquidate •	<input type="checkbox"/>	<input type="checkbox"/>
Do you know what you wish to do after you exit and the capital it will require?	<input type="checkbox"/>	<input type="checkbox"/>
Financial Resources		
Do you know what your business is worth to a qualified buyer, investor, or lender?	<input type="checkbox"/>	<input type="checkbox"/>
Do you know how much from the sell/transfer (after taxes) you will need to have the 'future you want'?	<input type="checkbox"/>	<input type="checkbox"/>
Do you know how to invest the proceeds from the sale/transfer to provide for the 'life you deserve'?	<input type="checkbox"/>	<input type="checkbox"/>
Exit Barriers		
Do you have a management team capable of running the company in your absence?	<input type="checkbox"/>	<input type="checkbox"/>
Are your company's operating systems, policies and procedures well defined and documented?	<input type="checkbox"/>	<input type="checkbox"/>
Is your company's future performance stable and NOT dependent upon one or two key employees?	<input type="checkbox"/>	<input type="checkbox"/>
Continuity & Contingency		
Do you have a written plan for your business if the unexpected happens to you?	<input type="checkbox"/>	<input type="checkbox"/>
Have you identified a person who can operate the business in your absence?	<input type="checkbox"/>	<input type="checkbox"/>
Is your company's relationship with lenders, vendors or customers stable enough to survive your death?	<input type="checkbox"/>	<input type="checkbox"/>
Tax Planning & Wealth Management		
Do you know how to minimize taxes when you sell or transfer your business?	<input type="checkbox"/>	<input type="checkbox"/>
Do you know how to reduce estate tax and maximize the transfer of wealth to the next generation?	<input type="checkbox"/>	<input type="checkbox"/>
Have you taken steps to protect your family's wealth?	<input type="checkbox"/>	<input type="checkbox"/>
Exit Options		
Do you feel that you have fully analyzed all of your exit options, opportunities and obstacles?	<input type="checkbox"/>	<input type="checkbox"/>
Have you identified your Buyer or Successor?	<input type="checkbox"/>	<input type="checkbox"/>
Do you know if your business is even marketable?	<input type="checkbox"/>	<input type="checkbox"/>
TOTALS		

- ➡ If you answered YES to at least 15 questions, congratulations! Your Exit Plan is likely well underway. [Contact us](#) if you would like us to review your plan.
- ➡ 10 to 14 YES answers mean you have a good start on your Exit Plan. [Contact us](#) to coordinate the missing pieces with the components already in place.
- ➡ If you have fewer than 10 YES answers, we suggest that you [Contact us](#) today to schedule a free consultation with advisors skilled in Exit Planning.

Your successful exit depends on a comprehensive Exit Plan.

Contact us at 800-230-9086