

Business Owner Planning Checklist

1. Have you decided when you want to exit from your business?	Yes <input type="checkbox"/> No <input type="checkbox"/>
2. Have you decided what amount of cash or annual cash flow you will need when you exit to support your preferred lifestyle?	Yes <input type="checkbox"/> No <input type="checkbox"/>
3. Have you decided to whom you want to transfer your business?	Yes <input type="checkbox"/> No <input type="checkbox"/>
4. Do you truly know how much your business is worth today?	Yes <input type="checkbox"/> No <input type="checkbox"/>
5. Do you know how to sell your business to an outsider and pay the least amount of taxes?	Yes <input type="checkbox"/> No <input type="checkbox"/>
6. Do you know if your business is even marketable?	Yes <input type="checkbox"/> No <input type="checkbox"/>
7. Do you have a plan for your business if the unexpected happens to you?	Yes <input type="checkbox"/> No <input type="checkbox"/>
8. Have you taken steps to protect your family's wealth?	Yes <input type="checkbox"/> No <input type="checkbox"/>

What is your score?

If you answered YES to **seven** or more questions, congratulations! Your Business Plan is likely well underway. If you would like us to review your plan, give us a call.

Three to six YES answers mean you have a good start on your Business Plan. Call us to coordinate the missing pieces with the components already in place.

If you have **fewer than three** YES answers, we suggest that you schedule a call with us. Your successful exit depends on a comprehensive Business Plan.