

EXIT PLANNING CHECKLIST

1. Have you decided:

. When you want to leave your business? Yes No

**. What amount of cash or annual cash flow
you will need when you exit? Yes No**

and

**. To whom you want to transfer your
business? Yes No**

**2. Based on future cash flow, do you know how
much your business is worth today? Yes No**

**3. Do you know how to best maximize the income stream generated
by your ownership interest – both before and after you leave
your business? Yes No**

**4. Do you know how to sell your business to a third party and pay
the least possible taxes? Do you know if your business is even
marketable? Yes No**

**5. Do you know how to transfer your business to insiders (family,
employees or co-owners) while paying the least possible taxes and
enjoying maximum financial security? Yes No**

**6. Do you have a plan for your business if the unexpected happens
to you? Yes No**

**7. Have you taken steps to protect your family's
wealth? Yes No**

