After the sale: plan your next chapter

Use this sheet to prepare a conversation with your appropriately qualified professionals. Write down the decision you want to make and what information is still missing.

01 Which funds are available after taxes and remaining transaction obligations?

02 How will our ordinary spending be funded in a difficult market period?

03 What exposure remains through a note, earn-out, retained shares or guarantees?

04 Which retirement-plan, insurance and legal tasks remain after closing?

05 What decisions should we make now, and which can wait until our next chapter is clearer?

LEAVE WITH AN AGREED NEXT STEP

Decision / information needed: _____

Person responsible: _____ Review date: _____

General education only. This is not individualized investment, tax, legal or insurance advice. No advisor relationship or introduction is created by using this sheet. Confirm the scope and responsibilities with each professional.