Business valuation: know what your ownership is worth

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 What exactly are we valuing, for which purpose, and as of what date?

02 Which assumptions have the greatest influence on the result?

03 What owner responsibilities or relationships would a buyer need to replace?

04 How should this result be reconciled with our buy-sell agreement and family planning?

05 What would make an update necessary before we act?

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.