Exit readiness: start before you need to leave

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 exit goals are essential, and where are we willing to compromise?

02 What can the family fund without any sale proceeds?

03 Which business responsibilities would be hardest to transfer today?

04 How would a delay, a lower price or deferred payments change the personal plan?

05 What should happen if I need to leave before the preferred timetable?

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.