Pre-sale planning: connect the deal and your life

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 is the estimated net cash under the current deal structure?

02 Which decisions have deadlines or depend on the transaction's legal stage?

03 How much value would remain contingent, deferred or invested in the buyer?

04 Would a proposed gift compromise the family's income or flexibility?

05 Who owns the closing checklist and the handoff to post-sale planning?

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.