Build wealth outside your business

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 parts of our family balance sheet depend on the same business outcome?

02 What obligations must remain accessible even during a difficult operating year?

03 How much of our retirement plan works without a business sale?

04 What transfer policy can the company sustain without weakening working capital?

05 Who will review investment costs, taxes and risk alongside changes in the business?

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.