



Business Owner Exit Readiness Scorecard

How Prepared Are You for a Future Business Exit?

Many business owners assume they will figure out the financial details once a sale becomes likely. In reality, the most successful exits are often the result of years of preparation.

Use the quick checklist below to evaluate your current level of readiness.

FINANCIAL PLANNING

- I know how much annual income my lifestyle will require after selling my business.
- I understand how the proceeds from a potential sale would translate into long-term income.
- I have a plan for investing and managing the proceeds after a sale.

BUSINESS VALUE & TIMING

- I have a realistic estimate of what my business may be worth.
- I understand how market conditions and industry trends could affect valuation.
- I have flexibility in my timeline if conditions aren't ideal.

TAXES & TRANSACTION PLANNING

- I have discussed tax implications of a sale with my advisors.
- I understand how different deal structures could impact taxes.
- I am exploring strategies that may help reduce taxes before a transaction.

PERSONAL & FAMILY PLANNING

- I have thought through what life will look like after the business.
- I have discussed long-term wealth planning with my family.
- My estate planning reflects the potential sale of the business.

YOUR SCORE _____

0–4 checks

You may be early in the planning process. Many owners begin exploring these issues years before a potential exit.

5–8 checks

You have likely begun planning, but there may still be important gaps to address.

9–12 checks

You appear to be well prepared, though many owners still benefit from a second perspective.

IF YOU'D LIKE TO COMPARE NOTES:

Bob Hoey works with business owners to evaluate how a potential exit could impact long-term income, taxes, and investment strategy.

To schedule a conversation, contact me.



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