



ONE PAGE EXIT & SUCCESSION PLAN

Business Overview	
When	
Buyer/Transition Target	
How Much	
Owner Agreement	
Life After	
Business Owner Reliance	

Business Value Goals	Now	+3 Years
Revenue		
Profit		
Multiple Range		
Value Range		

BUSINESS VALUE DRIVERS

Business Attractiveness Score	Now	+3 Years

Business Readiness Score	Now	+3 Years

Personal Wealth & Wellness Goals	Now	+3 Years
Estimated Net Proceeds of Business Transfer		
Personal Investments & Wealth (Net of Family, House, & Business)		
Total Capital After Exit		
Likely Income Generated from Investments		
Lifestyle Expenses/Spending		

PERSONAL DRIVERS

Wellness & Life After Score	Now	+3 Years

Personal Wealth, Tax & Risk Score	Now	+3 Years