**To assess your exit preparedness, please indicate your level of agreement with the following statements using this rating system: *0 – N/A, 1-Strongly agree, 2-Somewhat agree, 3-Neither agree nor disagree, 4-Somewhat disagree, 5-Strongly disagree***

1. I know when, how and to whom I want to leave my business. 0 1 2 3 4 5
2. I know how much money I’ll need, on an annual basis, after I leave my company to live a comfortable post-business life. 0 1 2 3 4 5
3. The current value of my company meets or exceeds the value I’ll need to retire comfortably. 0 1 2 3 4 5
4. I know what after-tax value I will need from my business to meet my financial objectives. 0 1 2 3 4 5
5. My key employee(s) are: (a) incentivized to increase the value of my business; and (b) motivated to remain with the company through targeted compensation benefits. 0 1 2 3 4 5
6. I have created a written, realistic growth strategy for my company that aligns with my Exit Plan. 0 1 2 3 4 5
7. I have taken steps (such as covenants not to compete for key people and restricted access to trade secrets) to protect my most valuable business assets. 0 1 2 3 4 5
8. I’ve taken all appropriate measures necessary to operate my business in the most tax-efficient way possible. 0 1 2 3 4 5

If you intend to transfer your company to a family member or employee, please skip to 13.

1. I’ve completed pre-sale due diligence and addressed all issues identified. 0 1 2 3 4 5
2. I’ve completed pre-sale tax planning to maximize the after-tax sale proceeds I will receive. 0 1 2 3 4 5
3. I know whether, and for how much, companies in my industry are selling. 0 1 2 3 4 5
4. I understand the nonfinancial characteristics that make my company valuable to a buyer. 0 1 2 3 4 5

 Please continue at 17.

1. If they had sufficient resources, I’d prefer to transfer my business to family or key employees. 0 1 2 3 4 5
2. I know how to transfer my business to family, employees or co-owners for top dollar while paying the minimal amount of taxes. 0 1 2 3 4 5
3. My company is free from family succession concerns. 0 1 2 3 4 5
4. My successor owner has the skills and knowledge to participate as an owner of the business. 0 1 2 3 4 5
5. I have written contingency plan for my business should something happen to me. 0 1 2 3 4 5
6. My contingency plan includes a mechanism to retain key employees. 0 1 2 3 4 5
7. My estate plan protects my family’s wealth by ensuring that it receives the full value of my ownership should I not live to transfer it. 0 1 2 3 4 5
8. My estate plan includes strategies to allocate business cash flow and transfer business ownership (and any related real estate) to the persons I choose. 0 1 2 3 4 5