



The Wadsworth Group  
*Your Financial Independence & Exit Planning Specialist*

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***Exit Planning Checklist***

Client:

1. Have you decided:

When you want to leave your business?

Yes       No

What amount of cash or annual cash flow you will need when you exit?

Yes       No

To whom you want to transfer your business?

Yes       No

2. Based on future cash flow, do you know how much your business is worth today?

Yes       No

3. Do you know how to best maximize the income stream generated by your ownership interest, both before and after you leave your business?

Yes       No

4. Do you know how to sell your business to a third party and pay the least possible taxes?

Yes       No

Do you know if your business is even marketable?

Yes       No

5. Do you know how to transfer your business to insiders (family, employees or co-workers) while paying the least possible taxes and enjoying maximum financial security?

Yes       No

6. Do you have a plan for your business if the unexpected happens to you?

Yes       No

7. Have you taken steps to protect your family's wealth?

Yes       No