



1. In your mind, how long do you think it takes to prepare so you can leave your business?
  
2. Do you know the current Enterprise Value of your business?
  
3. When you think about a 'bucket list', what are some of the things that you've always wanted to do?
  - \*Do you know whether you can afford to do these things without a paycheck?
  
4. What are your Legacy goals?
  - \*Do you have philanthropic aspirations?
  - \*Do you want your business to be carried into the next generation?
  - \*Do you want to invest in other businesses?
  - \*Do you have any Trusts in place and if so, are you familiar with their type and purpose?
  
5. Do you have a Buy Sell or Shareholder Agreement?
  - \*Is it current?
  - \*Is it funded?
  
6. Does your Estate Plan address your business?
  - \*Are your heirs prepared in the event of an untimely absence from the business?
  - \*Have you done any tax planning to prepare for your liquidity event?