

END GAME PLANNING

When a business owner begins to consider transitioning out of their business, one of the first steps should be for the owner to develop a written, personal end game plan that describes the various factors that are supporting the decision to exit, evaluates the ability of the owner to exit from a financial perspective, and consider what exit options might be most appropriate given the owner exit goals and objectives.

We work with business owner to educate them on important business exit issues, to provide them with a full list of exit options, determine if the business sale will fund their required post exit lifestyle, and evaluate all the pros and cons of the owner exiting their business.



Our planning process includes the following:

- Evaluating personal push factors.
- Evaluating personal pull factors.
- Recognizing and dealing with the negative factors of exiting a business.
- Fully defining stakeholder obligations.
- Determining if there is a gap between what the business is worth and what the owner needs to support their planned lifestyle.
- Providing information on potentials cost of selling the business
- Reviewing the full list of exit options and narrowing the exit option that best supports the owner's exit goals and objectives.
- Reviewing important timing issues and creating an exit plan timeline.
- Reviewing the need for specific advice from outside professional service providers.
- Helping to create a structured exit advisory team.

The deliverable from this service is a written End Game Plan that identifies the above issues and strategies and creates a written document with specific goals and objectives and an exit timeline.