

21 STEPS TO BUSINESS SUCCESSION & EXIT PLANNING

BUSINESS SUCCESSION AND EXIT PLAN

Stage One: Identify Value	STEP 1: Goals and Outcomes
	STEP 2: Fact Find
	STEP 3: Stage One Report - INSIGHTS
Stage Two: Protect Value	STEP 4: Financial Planning
	STEP 5: Unplanned Events
	STEP 6: De-risking
Stage Three: Maximise Value	STEP 7: Exit Options
	STEP 8: Strategic Planning Business Model
	STEP 9: Strategic Financials
	STEP 10: Systems and Procedures
	STEP 11: Marketing and Sales
	STEP 12: Corporate Governance
	STEP 13: Ownership Mindset
	STEP 14: Peak Performance
	STEP 15: Management Succession
Stage Four: Extract Value	STEP 16: Tax Planning
	STEP 17: Documentation
	STEP 18: Liquidity Event
Stage Five: Manage Value	STEP 19: Ongoing Investment Planning
	STEP 20: Asset Protection
	STEP 21: Estate Planning