



EXIT IQ PROVEN EXIT PLAN PROCESS

SMART Exit Goals & Objectives	Build & Preserve Business Value	Design & Execute Optimum Exit Strategy	Business Risk & Continuity Plan	Integrate Exit & Personal Wealth Plan
Exit Assessment	Business Valuation	Third Party Sale	Business Financials	Asset Ownership
Set SMART Exit Goals	Increase Transferrable Value	Family Transfer	P&C Risk Assessment	Investment Policy Statement
Business Profile	Entrepreneur Op System	Partners / Mgt Transfer	Asset Protection	Investment Management
Personal Financial Profile	Buy Sell Agreement	ESOP	Estate Planning	Family Wealth Transfer
Confidentiality Agreement	Buy Sell Key Person Life/DI	Liquidation	Mgt Team Development	Family Governance
Advisor Council	Executive Compensation	Income GAP Analysis	Finalize Exec Comp	Wealth Building Strategies
	NQ Deferred Comp	Inv Banker Selection	Final Terms & Conditions	Charitable Gifting
	Qualified Plan Review	Business Preparation	Legal Documents	Final Integration Review
	Non-Compete Agreements	Quality of Earning Analysis	Close Transaction	
	Tax Strategies	Confidential Data Room		
	Employee Benefit Review	Valuation Discounts		
		Financing		
		Business to Market		