

Clear **PATH** To Cash
More Money, More Time, Better Business

Succession Planning

The Deliberate Exit Strategy WORKSHEETS

List What The Ideal Situation Would Look Like Time Frame _____

Income _____

Investment _____

Involvement _____

Legacy _____

Values _____

Identify What Your Exit Would Look Like for These People

Family _____

Managers _____

Other Owners _____

What Is Standing In Your Way

1 _____

2 _____

3 _____

What is your total current compensation? \$ _____

Will any expenses change? \$ _____

Will you travel more? \$ _____

Will your house be paid for? \$ _____

Will you reduce any work-related expenses? \$ _____

Others? \$ _____

What would you like your retired income to be? \$ _____

Expected annual future income from other sources:

401(k) \$ _____

Other retirement plans \$ _____

Social Security \$ _____

Other investments: \$ _____

Total Income From Future Sources \$ _____

Difference Between Desired and Future Sources \$ _____

This amount needs to come from the business