



# the BUSINESS HOUSE, inc.<sup>sm</sup> – Custom Designed Exit Planner

## Owner's Goals & Objectives

Initial interview with the owner to clearly define Goals & Objectives:  
(Specific – Measurable – Achievable – Realistic – Timely)

- Personal
- Business
- Financial

## Activity Schedule and Contingency Plan

Define and map-out a timeline and things to get accomplished

- Death
  - Family Love Letter
- Disability

## Identify Trusted Advisor Team

the Business House inc. will coordinate the efforts of the Team:

Accountant	Financial Planner
Business Advisor	Attorney
Wealth Manager	Exit Planner

## Exit Options

Sell or Hold	Management Buyout
Sell to Third Party	ESOP
Generation Transfer	Re-Capitalize

## Position the Company for Maximum Return

Identify the Value Enhancers (54 critical items);

Dealing with such issues as Personal, Business Operations, Industry Marketplace, Legal & Regulatory, Financial, Economic Cycle

## Life after Sale

Exit Process

Transition

Questionnaire

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