



12600 Deerfield Pkwy, Suite 100
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Keep or Sell Test

Knowing when to act and when not to act is a key component in all important decisions. Likewise, knowing when to keep your business and when to sell it can make a significant difference in the success of your exit and your future financial security. Take the following test and review your answers with your BUSINESS HOUSE Planning Advisor to ensure that your timing is perfect!

1. Have you had your company valued by an independent, knowledgeable party?

Yes No

2. Have you and your financial advisor determined how much money you would need to invest to support your current life style if you retired?

Yes No

3. Are you able to take a vacation and not call the office for a week or more at a time?

Yes No

4. Do you have a specific plan regarding what you would like to do after you sold your business (playing more golf doesn't count)?

Yes No

5. Do your top 5 customers account for LESS than 30% of your revenues?

Yes No

6. Have you identified which exit option is the most appropriate for you?

Yes No



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7. Do you know how much you would net from the sale of your business (after taxes and transaction fees)

Yes No

8. Do you have job descriptions for each of your key employees?

Yes No

9. Have you documented your office, service, manufacturing, and marketing processes?

Yes No

10. Would you like to retire?

Yes No

11. How is your health?

Some Major Issues Typical Aches and Pains Excellent

12. How is your energy level?

I'm burned out I feel like a caretaker I'm still passionate

13. What is the outlook for your industry?

Growing Mature Shrinking

14. What has been the trend for your revenues and profits over the last five years?

Increasing Flat Decreasing



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15. What is the primary source of new business for your company (**please select only one**)?
- a. E Commerce activities
 - b. Your marketing and sales team
 - c. Advertising
 - d. Referral and word of word of mouth
 - e. Your efforts and relationships



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Grade this test by adding up the scores assigned to each of the answers. Generally speaking, the lower the score, the more likely it is that it may be time to sell. The higher the score the more likely it is that you should keep the business, do some formal exit planning and sell the business at a later time.

Obviously, your final decision will depend on a number of factors (and the weighting of those factors) that cannot be measured by this simple test. This tool should only be used as a diagnostic tool to highlight issues and potentially facilitate a formal exit planning situation.

Numbers 1-10: Yes answers are worth ONE point, No answers are worth TWO points.

Numbers 11-14: Have three choices rate them ONE point (first answer) TWO points (second answer) THREE points (third answer)

Number 15: a, b, c, d, ONE point, e TWO points

Lowest Possible Score is 15

Highest Possible Score is 34

Where do you fall?