

Business Transition Readiness Review	Readiness Score (Yes, Unsure, No)
1. A strong Management team	
2. Clear vision of the future	
3. Multiple ongoing revenue streams	
4. Well distributed knowledge and skills among multiple generations of employees	
5. Defined and documented policies and procedures	
6. Clear and efficient corporate structure	
7. Company value includes adequate hard assets not only goodwill	
8. Complete and accurate financial statements	
9. High EBIDTA (earnings before interest, taxes, depreciation and amortization)	
10. The business has a unique value proposition	
11. The services and value you provide are not easily replaced by others	
12. Well positioned for high-growth opportunities	
13. Limited number of non-core assets in operating company	
14. Limited number of family members on payroll	
15. Limited impact on the business if owner is away for 3-6 months	

Top areas of needed focus	Action Steps
1.	
2.	
3.	

NOTES: