CORNERSTONE BUSINESS SERVICES

THE CONVERSATION™

"THE CONVERSATION™" is a meeting designed to start the discussion with business owners about transitioning out of their business some point in the future.

During "The Conversation™" your situation, objectives, and challenges will be discussed in detail. Company performance, retirement goals, transition options and their desire to continue running the business are all things that should be considered. The purpose is to provide you with a sense of direction and control in the face of the uncertainty and stress generated by every company's inevitable transition.

Are you in need of "The Conversation™"? Here are a few questions you should ask yourself to see if it is time to plan a discovery call with Cornerstone to discuss your exit options and answer any other pertinent questions you may have.

AGREE	DISAGREE	
☐	☐	1. I want to leave my business on my terms and Finish Strong.
☐	☐	2. I don't know what my business is worth in today's M&A marketplace.
☐	☐	3. I don't know what my net proceeds after taxes would be from a sale.
☐	☐	4. I don't know what I would need from those net proceeds to live my ideal lifestyle after selling my business. *(Lifestyle Number™)*
☐	☐	5. I'm starting to get tired/burned out and want to slow down and enjoy life.
☐	☐	6. My children are not interested or capable of running the business.
☐	☐	7. I have been approached by someone interested in purchasing my company and/or I'm aware of consolidation in my industry.
☐	☐	8. The majority of my net worth is tied up in the business, and I would like to diversify my investment risk by taking some "chips off the table".
☐	☐	9. If something were to unexpectedly happen to me, my spouse, family, and employees would be left with a messy, uncertain future for the business.
☐	☐	10. There has been a health scare for myself or a loved one; now is the time to "stop and smell the roses".
☐	☐	11. I have a bucket list of things I'd like to do or people I want to have a positive impact on, but have not been able to due to my business.
☐	☐	12. My relationship with my spouse and/or partner is being stressed due to the business, and it's emotionally draining.
☐	☐	13. I have taken the company as far as I can/want to take it and I need to find a successor that can take the company to the next level.
☐	☐	14. I want the company to succeed after my planned/unplanned exit.
☐	☐	15. It is time to do something different with my life.

Results – Based on Total "AGREE" Responses –

0-3 You may not be planning a transition soon, but we can help you create a written exit strategy that will help protect the value of the business you've built.

4-8 You would benefit from "The Conversation™" for planning purposes.

9-12 Your transition is coming soon. "The Conversation™" would be beneficial now.

13-15 "The Conversation™" should have happened years ago.

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