CORNERSTONE
BUSINESS SERVICES

THE CRITICAL QUESTIONS FOR BUSINESS OWNER CLIENTS

1. Have you had a Real Market Analysis (RMA) done in the last 1-2 years by a respected M&A firm that understands the current market for a business like yours? (Not just software/formula driven valuations)
___Yes ___No

2. Do you understand the specific tax ramifications of your potential sale/exit, and what you would net after taxes from the sale?
___Yes ___No

3. Have you met with your Financial Advisor to determine what you need to net out of your sale/exit to live your ideal lifestyle?
___Yes ___No

4. Do you have sufficient life insurance to protect you, your family, and the business if something were to happen to you?
___Yes ___No

5. Do you have a written plan as to how, when, and why you will exit your business?
___Yes ___No

6. Are you aware of your ~10 different Exit Options, and which is best for you?
___Yes ___No

If your client answered "no" to any of the first 6 questions, there is work to be done. Contact Cornerstone for a discovery call and we can work together to create a plan.

7. Industry _____ Revenue _____

8. Is the business your largest financial asset and primary source of income?
___Yes ___No

9. In your ideal scenario, when do you plan to exit your business?
___ now ___ 3 mos-12 mos ___ 1-2 yrs ___ 2-5 yrs ___ 5-10 yrs ___ 10+ yrs

10. What if today was your last day on earth? What would happen to: (optional)

Your Business _____

Your Family _____

Your Employees _____

Your Legacy _____

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