

## ARE YOU READY TO SELL?

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Have you had a business valuation completed in the last 2 years by a Business Broker or 3rd Party Valuation company? (Not your Accountant)

Yes     No

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Have you (and significant other) met with a Financial Planner in the last 2 years to see what you will need for retirement income to set goals & timeline?

Yes     No

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Have you met with an Estate Planning Attorney in the last 2 years to insure all legal documents are in place to protect you, your family and the future of your business?

Yes     No

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Have you met with your business banker to update line of credit and commercial loan balances to prepare a debt reduction schedule to coincide with selling your business?

Yes     No

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Have you met with an Insurance Advisor in the last 2 years to insure all the needed policies are in place to protect you, your family and the future of your business?

Yes     No

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Have you identified an individual or chosen to sell to a 3rd party as the next owner of your business? Are the details of that plan in written form and reviewed and accepted by all parties involved?

Yes     No

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### RESULTS:

**IF YOU ANSWERED "NO"** on any one question, you are among the 75% of business owners who do not know the value of their business and do not have a Business Succession Plan in place. Contact us to get started now on protecting the legacy of your business.

**IF YOU ANSWERED "YES"** for all 6 questions, contact Beacon for M&A guidance for the next step.