



Transitioning Business Discovery Form

Let's determine your current situation to support your goals. Please read through and answer all 10 statements.

1. I have enough cash to fund the first clause of my will which states, "pay my debts and taxes and expenses of settling my estate."
Yes No Unsure Does Not Apply
2. I have a secure, independent source of income for my spouse, independent of the operating company.
Yes No Unsure Does Not Apply
3. I know how I will divide up my estate amongst my family in a way that is fair and equitable to maintain family harmony.
Yes No Unsure Does Not Apply
4. I have a clearly documented transition plan in place to deal with control of the operating company.
Yes No Unsure Does Not Apply
5. I have a plan that will preserve the working capital of the company and leave it financially healthy.
Yes No Unsure Does Not Apply
6. I have a retirement plan for the founder, independent of the business.
Yes No Unsure Does Not Apply
7. I have a plan in place to pass assets down to our children, grandchildren or a special charity.
Yes No Unsure Does Not Apply
8. I know how much money I will receive each year after tax in retirement.
Yes No Unsure Does Not Apply
9. I am confident that my money will last as long as I do.
Yes No Unsure Does Not Apply
10. I know the projected value of my estate and have created strategies to minimize taxes and fees.
Yes No Unsure Does Not Apply

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