



THE "EXIT READY" SCORECARD

Most business owners wait until they are ready to retire before thinking about the value of their company. By that point, it can be too late to make meaningful changes. A business that is ready to be sold is simply a better business to run today. It becomes more profitable, easier to manage, and much more valuable over time.

This checklist helps you look at your business through the lens of value acceleration. It will show whether you are building true equity or simply generating income. How many of these boxes can you check with confidence?

The Value Acceleration Checklist

	1. The "Wealth Gap" Calculation I know the exact difference between what my business is worth today and what I need it to net after taxes to fully support my ideal life after I exit.
	2. The "Vacation Test" If I stepped away for four weeks with no contact, the business would continue to run and grow without me. My role has shifted toward leadership rather than day-to-day operations.
	3. The "Three Legs" Alignment I have clear and documented plans for my business strategy, my personal financial plan, and my life after ownership.
	4. De-Risked Revenue No single customer makes up more than 15 percent of revenue, and we have recurring or contractual revenue streams rather than relying only on one-time transactions.
	5. Transferable "Structural Capital" Our processes for sales, operations, and delivery are documented in a playbook that others can follow. The knowledge lives in systems and not only in employees' heads.
	6. Key Management Retention A stay bonus or long-term incentive plan is in place to keep key leaders committed through a transition and after I step back.
	7. The 90-Day Rhythm We follow a 90 day execution rhythm that strengthens the business, reduces risk, and grows value, rather than getting caught in day-to-day tasks.

How did you score?

- **All 7 Checked:** You are in the top 2% of owners. Your business is a transferable asset.
- **5-6 Checked:** You are on the right track, but hidden risks may lower your multiple.
- **Fewer than 5:** Your business is likely dependent on you. You may be leaving millions on the table.

Ready to close your Wealth Gap? Book your initial advisory session today!