

# The many steps in an Exit Plan

Planning	Valuation	Recommendations	Execution
Initial meeting	Brokers Opinion of Value using 3 valuation methods	Value enhancement Recommendations	Co-ordinate with owner's professional advisors
↓ Complete data collection	↓ Price and structure analysis	↓ Detailed analysis of clients exit options	↓ Apply for prequalification of third party financing
↓ 4 to 6 hour interview with business owner(s) only	↓ Review of company's operations with recommendations	↓ Tax planning and minimization	↓ Review Estate Plan
↓ Internal discussions and review of data	↓ Value analysis	↓ Personal action plan	↓ Prepare Financial Plan
↓ Research industry, types of buyer & sales of similar companies	↓ Final business value	↓ Business action plan	↓ Implement recommendations

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