

# Exit Readiness Scorecard

*How Prepared Is Your Business For What's Next?*

Exiting your business is one of the most significant financial and personal decisions you will ever make.

This self-assessment is designed to help business owners evaluate their readiness — financially, operationally and personally — for a future transition. Whether your exit is years away or approaching sooner, preparation today creates flexibility and protects value.

## How To Use This Scorecard

There are no right or wrong answers. The goal is awareness — not perfection.

### Instructions

- Read each statement carefully
- Rate how true it is for your business today
- Be honest — this is for your insight only

### Scoring

Score	Meaning
1	Not at all true
2	Somewhat true
3	Mostly true
4	Completely true

## Vision & Personal Readiness

### Statement

I have a clear idea of when I would like to exit or transition my business.

1	2	3	4
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

I know what I want my role to be after the exit.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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I have considered how exiting the business fits into my personal and family goals.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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I feel emotionally prepared to step away from daily control of the business.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**Section Score:** ☐ / 16

## Financial Readiness & Reporting

### Statement

Financial statements are accurate, timely and consistent.

Reviewed or audited financials are available or attainable.

Owner add-backs are documented and defensible.

Revenue streams are clear and predictable.

1	2	3	4
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Section Score: ☐ / 16

## Business Value & Marketability

### Statement

I have a realistic understanding of what my business may be worth.

I understand what drives — and detracts from — business value.

The business would be attractive to buyers outside my family.

I have taken steps to intentionally increase business value.

1	2	3	4
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Section Score: ☐ / 16

## Operational Independence

### Statement

The business can operate without my daily involvement.

Key relationships are not dependent solely on me.

Processes and responsibilities are documented.

Strong leadership is in place to support a transition.

1	2	3	4
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Section Score: ☐ / 16

## Technology & Data Readiness

### Statement

Accounting and operational systems are modern and integrated.

KPIs are tracked regularly.

Performance data is easy to access and explain.

Systems would inspire confidence during due diligence.

1 2 3 4

☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Section Score: ☐ / 16

## Tax & Retirement Planning

### Statement

I understand the tax implications of exiting my business.

Steps have been taken to minimize taxes in advance.

My retirement plan aligns with my exit strategy.

I am confident the exit will support long-term financial security.

1 2 3 4

☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Section Score: ☐ / 16

Your Total Exit Readiness Score: ☐ / 16



# What Your Score Means

## **80-96 — Highly Prepared**

Your business is well positioned. Strategic refinement may further increase value and reduce risk.

## **60-79 — Moderately Prepared**

You are on the right path, but gaps remain that could affect timing, value or taxes.

## **40-59 — Early-Stage Planning**

Planning has begun, but significant opportunities exist to improve readiness.

## **Below 40 — High Risk**

Without proactive planning, your exit may be rushed, delayed or undervalued.

## **Next Step: Turn Insight Into Action**

Exit planning is not about rushing toward retirement — it's about building options, protecting value and aligning your business with your personal goals.

A one-on-one exit readiness consultation can help you:

- Identify priority gaps
- Understand your business value
- Align tax, financial and operational planning
- Create a realistic roadmap forward

## Exit Planning Starter Consultation

Thinking about what comes next for your business doesn't mean you're ready to sell. It means you want clarity.

Our Exit Planning Starter Consultation is a no-pressure conversation designed to help business owners better understand their options, timing and readiness — without any obligation.

[Schedule Consultation](#)

## Contact Us



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