

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.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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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

1 2 3 4

Financial statements are accurate, timely and consistent.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Reviewed or audited financials are available or attainable.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Owner add-backs are documented and defensible.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Revenue streams are clear and predictable.

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

Business Value & Marketability

Statement

1 2 3 4

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

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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I understand what drives — and detracts from — business value.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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The business would be attractive to buyers outside my family.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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I have taken steps to intentionally increase business value.

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

Operational Independence

Statement

1 2 3 4

The business can operate without my daily involvement.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Key relationships are not dependent solely on me.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Processes and responsibilities are documented.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Strong leadership is in place to support a transition.

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

Technology & Data Readiness

Statement

1 2 3 4

Accounting and operational systems are modern and integrated.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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KPIs are tracked regularly.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Performance data is easy to access and explain.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Systems would inspire confidence during due diligence.

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

Tax & Retirement Planning

Statement

1 2 3 4

I understand the tax implications of exiting my business.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Steps have been taken to minimize taxes in advance.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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My retirement plan aligns with my exit strategy.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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I am confident the exit will support long-term financial security.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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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



ACCOUNTING | TECHNOLOGY | WEALTH ADVISORY

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](#)

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