



TOM DONCASTER CLU, AIF

Business Exit Planning

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7 Steps to Selling your Business

Recipient

- 1. Reasons for the Sale. – Health Issues, Targeted Retirement etc**
- 2. Time of the Sale – Two Years, One Year etc**
- 3. Business Valuation**
- 4. Should you Consider using a Business Broker (10-12%)**
- 5. Preparing Legal Documents for the Sale (Competitor, Co-Founder, Employee etc) - Attorney**
- 6. Finding a Buyer (who is best suited)**
- 7. Handling the Profits of the Sale (CPA and Financial Advisor)**

Your Name