

PLANNING STEPS TOWARD SUCCESS



We offer exit planning consultation, a wealth of proven success strategies, as well as strategy implementation management. We're available for keynote presentations, seminars, and workshops in exit planning.

NEXT JOURNEY®
7 steps to a graceful exit

CLIENTS UNDER MANAGEMENT™
Diversify revenue source

INCOME REPLICATION MODEL™
Life after business

PROFITS MATTER™
The bottom line

P VARIABLES™
Key value drivers

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NEXT JOURNEY®

The 7 STEPS TO A GRACEFUL EXIT

The first step is to **determine the current value** of your business.

vs.

The second step is to **set your exit objectives**.

years, \$

The third step is to **convert the value** of your business to cash.

or

The fourth step is to identify **key "Value Drivers"**

Marketing + Maximize

Predictable + Management Team

The fifth step is **wealth preservation** planning.

Anticipate consequences & keep it in the

The sixth step is contingency planning – "**what if's**"

Loss of

The seventh step is set **key metrics monitoring systems**.

Monitor periodically