

GOFF LEGAL PC

BUSINESS SUCCESSION PLANNING WORKSHEET

Question #1: What is your purpose for business succession?

Why is this important to you? What are your objectives?

Question #2: How is your business set up?

Solo shop, number of employees, future growth?

Question #3: Who relies on you/the income from your business?

You, family, minor children, other employees, community?

Question #4: Who is on/needs to be on your team?

On the team:

Needed on the team:

CPA

CPA

Biz Atty

Biz Atty

\$ Advisor

\$ Advisor

EP Atty

EP Atty

Ins Agent

Ins Agent

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Additional Team Options:

Who else is on your team or needs to be? Key employees, business valuation experts, business succession planning advisors, etc.

Question #5: What Documents do you need?

Pro tip: Ask your team!

Question #6: What timelines do you need to consider?

- PLANNED - LONG TERM
- PLANNED - SHORT TERM
- UNPLANNED - EMERGENCY
- UNPLANNED - DEATH/LONG
TERM DISABILITY

Question #7: What is your next FIRST step?