

Mark an "X" in the column adjacent to each factor to reflect your personal feelings on perceptions	Addressed - No Concern	Merits Attention	Concerned
Owner Motivation and Perspective			
Servant Attitude: Keep, Sell the Business			
Personal Financial Planning			
Estate Planning			
Credit Continuity			
Exit Strategy			
Financial Independence from the Business			
Business Structuring			
Structuring—Sub S, Regular, LLC, LP			
Business Documentation			
Business Performance			
Business Capitalization			
Business Profitability			
Strategic Planning			
Growth Vision			
Management Mission Statement			
Strategic Plan with Accountability			
Leadership Management and Continuity			
Successor Talent			
Supporting Management Talent			
Supporting Management Experience			
Management Synergy and Teamwork			

(Continued from inside)

Mark an "X" in the column adjacent to each factor to reflect your personal	Addressed - No Concern	Merits Attention	Concerned
Successor Preparation			
Successor Selection			
Successor Training			
Successor Experience/Readiness			
Family			
Family Communication			
Family Harmony			
Family Governance			
Total Score:			

Succession Snapshot



Your Name: _____

Business Name: _____

Phone: _____ Email: _____

For a complimentary discussion, send the completed assessment to info@rawlsgroup.com

If you have any questions regarding this assessment, or would like additional assessments contact info@rawlsgroup.com



BUSINESS
SUCCESSION
PLANNERS