

Legacy Exit Planning Guide

A Purposeful Approach to Business Transition

This guide is designed for business owners who want to approach their exit as an act of stewardship—not just a transaction. Use this tool to reflect on your goals, assess your readiness, and begin preparing for a transition that aligns with your values.

Step 1: Clarify Your Goals

- ☐ What do I want my legacy to be as a business owner?
- ☐ Who are the people I want to honor in this transition (employees, partners, family, customers)?
- ☐ What outcomes do I care most about—financial, relational, or otherwise?
- ☐ What will bring me peace and purpose in this next chapter?

Step 2: Assess Your Readiness

- ☐ Is my business financially healthy and well-documented?
- ☐ Can it operate without me on a day-to-day basis?
- ☐ Do I have systems and leadership in place to support a transition?
- ☐ Have I had a recent business valuation or market analysis done?

Step 3: Explore Your Options

- ☐ What transition paths could make sense (sale, internal succession, partnership)?
- ☐ Have I spoken with an M&A advisor to understand the landscape?
- ☐ What timeline would allow for a smooth and intentional transition?
- ☐ Are there buyers or partners who align with my values?

Next Steps

Taking the time to think through your goals, readiness, and options is the foundation of a well-stewarded exit. You don't have to figure it all out alone. At The NEO Team, we walk with you through the entire process—honestly, helpfully, and with a hopeful outlook.



Schedule a confidential consultation at theneoteam.com