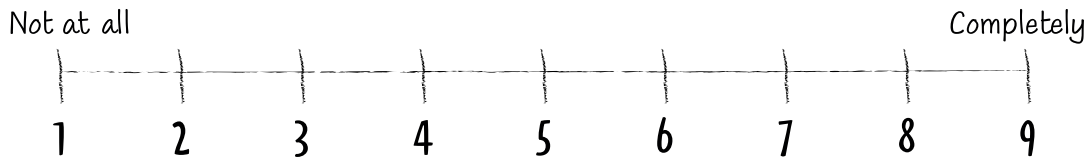


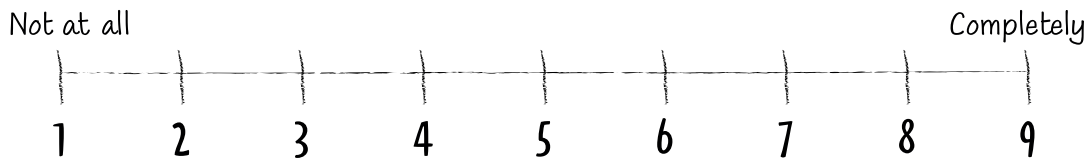
The Business Owner Transition Confidence Survey™

Before you begin your transition journey, it's normal to have a number of concerns about the road ahead. To help you identify and assess your specific concerns, please use a scale of 1 to 9 to indicate your confidence level related to each.

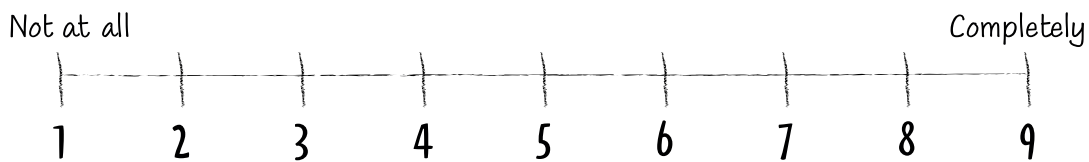
1. Next Adventure: I am confident in my Next Adventure and excited to live it.



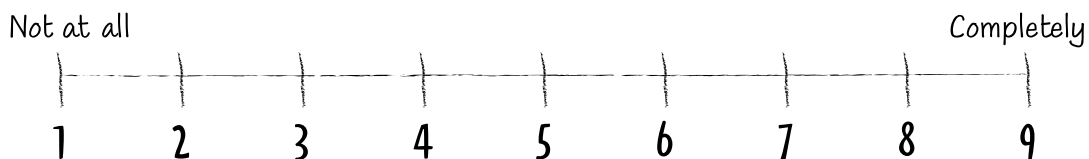
2. Successor: I am confident in my successor. I have chosen the best leader to take the business forward.



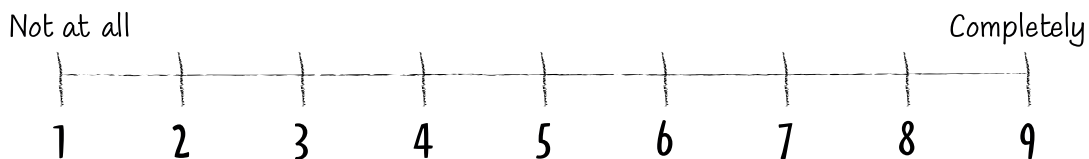
3. Financial ROI: I am confident I will harvest my investment (get the money I desire) from the transition of my business.



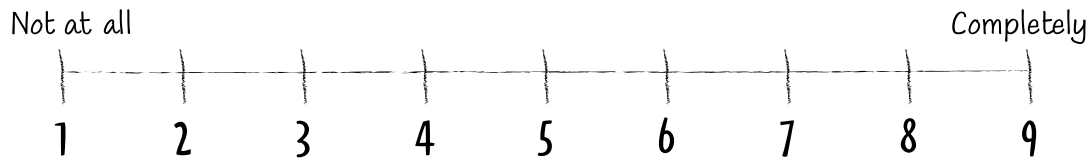
4. Financial Freedom: I am confident I will have the money necessary to live my Next Adventure the way I desire.



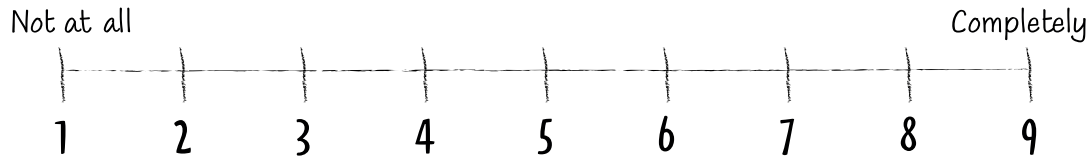
5. Optimal Tax Strategy: I am confident the tax strategy I have planned for the transaction will yield the outcome I desire.



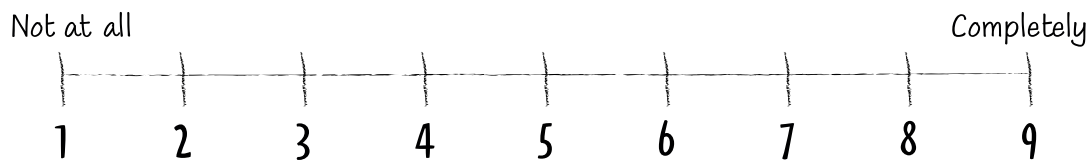
6. Business Resources: I am confident my business has and can generate the resources needed (including cash flow) to support the additional expenses that will be incurred throughout the transition.



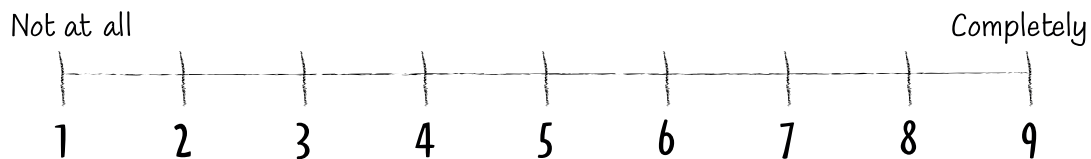
7. Fairness and Equality: I am confident I have tackled fairness and equality and that they will not be issues for me or for my family, partners or employees.



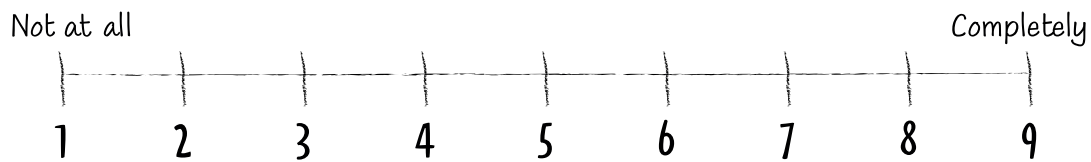
8. Financial Commitments: I am confident the financial institutions that support my company's operations will accept my successor as a guarantor of those obligations.



9. Leadership: I am confident in my ability to lead my successor, team and family through my business transition.



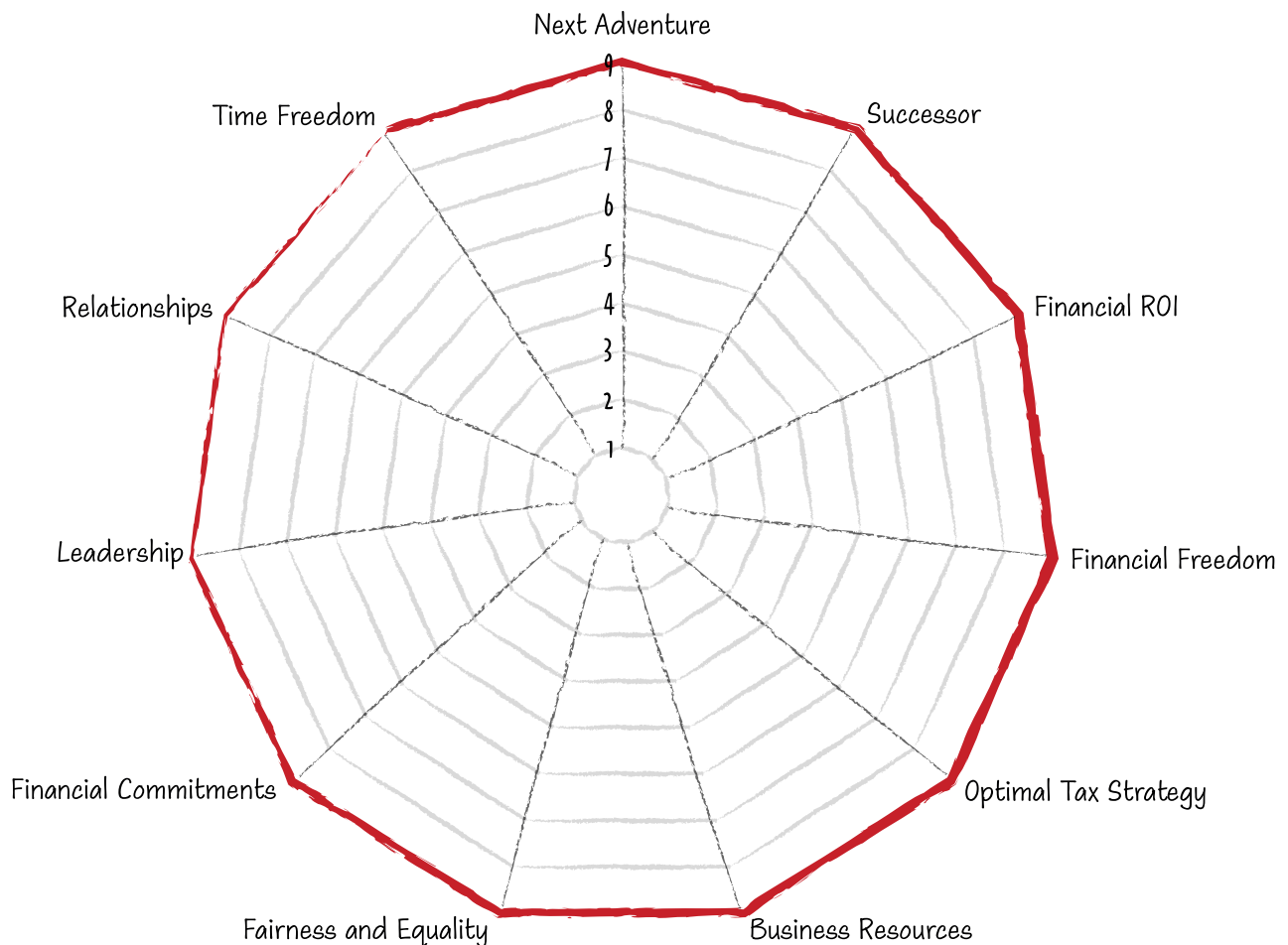
10. Relationships: I am confident the succession plan I envision will protect and support the relationships that I value.



11. Time Freedom: I am confident I will gain choice of time as I go forward in my transition journey and will meet my transition timetable.

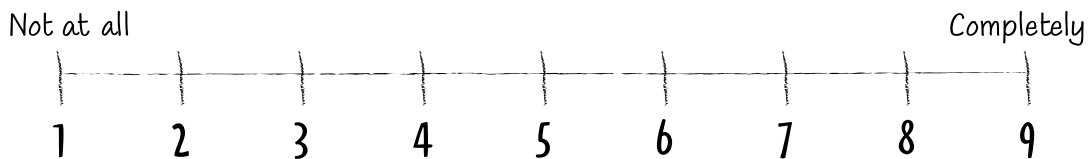


The Business Owner Transition Confidence Spider Graph



Please plot your ratings from The Business Owner Transition Confidence Survey on the Spider Graph, then connect the points.

Overall Rating: Looking at your Business Owner Transition Confidence Spider Graph, how clear and confident are you in your business transition?



Once you establish your goals for your transition and think about its elements in the order we recommend (Why, What, Who, When, How Much and How), your confidence level will likely grow exponentially.

If you'd like additional copies of this Survey and Spider Graph, please go to www.TheSuccessionPlanningBook.com/Tools.