

# Entrepreneur Transaction Readiness Assessment

Navigating change is never easy, and it is only palatable when it's on your own terms and the motivation to make a change comes from within. When you are ready, we believe that time spent preparing the company to sustain itself beyond your time at the helm will greatly increase the odds that all stakeholders—you included—will be happy with the results down the line.

**Once complete, you should discuss your results with your advisor.** At Brown Advisory, we believe you should expect more from your wealth manager. Cross-functional leadership is critical to helping entrepreneurs successfully complete a business transition. Our Advisory capabilities can help business owners achieve success and avoid predictable mistakes and sub-optimal outcomes.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I won't select a business exit strategy (what exactly I'm going to do with the business) until after I determine post-exit goals for myself and my family.					
I won't select a business exit strategy until after I determine my goals for my business, employees and my customers/clients.					
I had a professional run the numbers and I am confident I will have sufficient wealth and cash flow post-exit to maintain my family's lifestyle.					
I have already begun working on a plan to transfer my responsibilities and believe the business is sustainable and transferable without me.					
I am executing on a written plan to create predictable revenue growth and a sustainable, transferable, business.					
I am very confident in the business's future, my ability and stamina to lead it for the next 5 years.					
I have an advisor with cross-functional knowledge who I can rely on to help me assemble a team to collaboratively navigate a business transition.					
I know what strategy and process to follow to assess the exit options that will best accomplish my exit goals and objectives.					
I am confident in my ability to assess whether my business is transaction-ready, and its ability to withstand the M&A due diligence process.					
My management team understands the future potential value of the business and I know how to best communicate it to prospective buyers.					

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