BIZ QUIZ

The Financial Clarity Group
Business Owner Succession Planning Quiz

You're running a business – and planning for the future is important. But you may be putting off some VERY key issues. Take the BIZQUIZ™, designed to make you think about the most important decisions that could effect the future of your business.

NAME DATE

Do you have a written "Out of Office Plan" (6 months no contact with staff or clients)?

YES NO

Do you have an "If Something Happens to me Letter" that would be mailed out to your staff and clients?

YES NO

Do you have a written succession plan documented with your successor or family members?

YES NO

Could your business operate if you missed an extended period of time?

YES NO

Do you know who would run the company if you had an extended absence?

YES NO

Have you had business appraised within the last 3 years?

YES NO

Do you plan to fund your retirement with the sale of your business?

YES NO

FINANCIAL CLARITY GROUP
CPAs and Advisors

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