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Your Business: Next Steps Survey

Please check all that apply:

My spouse and I have discussed and understand our financial goals for retirement

I have a contingency plan for my business, both for a possible downturn in the economy, or if I should pass away unexpectedly

I have informed my spouse about my business, should something happen to me (location of important papers, plans for the future, who my trusted partners are, who should take over the business in the interim or permanently)

I know the value of my company, should I decide to sell it

I understand the challenges that I may face when selling my company

I understand how to grow my company through acquisition

I have plans in place, so my business is not dependent upon me for running the day-to-day operations

My business is in good financial order and would be attractive to the right buyer

I could use an influx of funds for growth, and I know all of my options for obtaining this funding

I understand the importance of working on a transition plan 2-7 years in advance of the sale of my business, in order to maximize its value

My business is growing beyond my management expertise. I understand the need to seek guidance to position my business for future growth

I might want to merge with another company, but don't fully understand the benefits and the process

My sales are in a free fall, and I am not certain who to turn to

Please email the completed form to diane@cjonesgroup.com.