



DUFFY KRUSPODIN
CPAs & Trusted Advisors

Exit Readiness Snapshot

A Business Owner's Guide to Timing, Transition, and Strategy

Thinking about your business exit? This snapshot offers a strategic lens on how to evaluate your readiness across key dimensions—so you can preserve optionality, strengthen value, and move forward with intention.

Three Dimensions of Exit Readiness

Business Readiness

- Can the business operate independently of your day-to-day involvement?
- Are key systems, leadership roles, and financial reporting functions documented and transferable?

Market Readiness

- Are market conditions currently favorable in your industry?
- Would a buyer or successor see growth potential based on your current position?

Owner Readiness

- Do you know what you want your next chapter to look like?
- Are your personal, family, and estate planning strategies aligned with your exit timeline?

Exit Readiness Self-Check

- Before you start planning your exit, consider whether you've addressed these foundational areas:
- My business could operate without me for at least six months.
- Key team members and systems are in place to support continuity.
- I understand how market timing could impact valuation and deal structure.
- I have defined personal goals for life after the business.
- My estate, tax, and succession plans are up to date and integrated.
- I have had preliminary discussions with my advisory team about potential timelines and goals.

ADVISOR INSIGHT

"The most successful exits aren't about timing the market—they're about aligning your business, your goals, and your timing. Planning ahead gives you room to think, adjust, and exit on your terms."

Homer Smith
Private Wealth Advisor
DK Wealth Management

Early planning gives you more options later.

Begin assessing your business and personal runway today—and prepare for a transition that supports what matters most.

For further insights, schedule a confidential conversation at dk.cpa/contact-us.



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