Worksheet 5: Design a Unified Set of Goals for Your Best Case Scenario

Your desired annual income or cash out value:

Ownership transition:

To Whom:

Time frame:

Management transition:

To Whom:

Time Frame:

What continuing involvement in the business do you desire:

Personal Goals:

Income to spouse:

Income to other family members:

Charitable Goals:

Excerpted from "An Owner's Guide to Business Succession Planning" and used with permission by Iowa State University Extension Value Added Ag Program. The complete guide can be ordered from the Ohio Employee Ownership Center: http://dept.kent.edu/oeoc/publicationsresearch/publicationresearch.htm.