



Exit Planning for Business

June 15 – 16, 2022

Hyatt Place - Westlake

Cleveland, Ohio

AGENDA

June 15

8:00am	Breakfast
8:30am	Introduction to Value Acceleration Methodology
9:15am	Break
9:30am	Common Readiness Issues Business, Personal and Financial State of Owner Readiness Review
10:30am	Conducting the Company Diagnostic <ul style="list-style-type: none">• Three Gaps• Range of Values• Four Intangible Assessments• Conduct Mini Assessments
11:45	Lunch
1:00pm	Goals and Objectives <ul style="list-style-type: none">• Envisioning• One Year Goals• 90 Day Actions
3:00pm	Break
3:15pm	Open Discussion
5:00pm	Adjourn for the Day

June 16:

7:30am

Breakfast

8:00am

Slept on It / Takeaways and Discussion

8:30am

Exit Options

- Guest Speaker / Exit Option Analysis
- Panel Discussion:
 - Investment
 - Private Equity
 - Family
 - ESOP

10:00am

Break

10:15am

Wrap up / Discussions / Key Takeaways

11:00am

Adjourn