



Never sell your business: Tripling your exit price with the CEO Emeritus Plan

Worksheets

Exercise 1: How much is it worth?

How much do you need annually to live the lifestyle you want? (A) _____

Add in a safety factor for inflation, and other contingencies (B) _____

Adjust this number to pre-tax (C) _____

What rate of return do you expect on your investments? (D) _____
Keep in mind 20% returns can be achieved some years, but other years may be -20%

Take C divided by D.

This is what you need to net from the sale of your business. (E)

Take E and adjust for taxes on the sale of the business.
This is what you will need to sell for. _____

Exercise 2: What do others think it's worth?

Partner with the two people sitting closest to you. Jot down:

- Average profit for the last 3 years
- How many hours a week you work
- What are the 5 key functions/tasks you perform?
- How well would those functions work without you?

How did your partners valuation compare to yours?



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Exercise 4: How are you doing as CEO Emeritus activities

The 16 Hats	Doing well	Need improvement
1. Super-closer	_____	_____
2. True CFO	_____	_____
3. Visionary	_____	_____
4. Chief Strategist/Planner	_____	_____
5. Mentor	_____	_____
6. Chief I.P. Officer	_____	_____
7. Cheerleader	_____	_____
8. Standard Bearer	_____	_____
9. Chief Model Officer	_____	_____
10. Model Implementer	_____	_____
11. Key Relationship Holder	_____	_____
12. Decider	_____	_____
13. Marketing Mastermind	_____	_____
14. Frontman/woman	_____	_____
15. High-level Floater	_____	_____
16. Technology Mastermind	_____	_____

What is the most valuable work you do?

How many hours per year do you do these activities?



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If you only had to perform these duties, would you sell your business?

Personal Action Steps & Accountability

What action steps need to be taken? Who will perform?

1.

2.

Commit to a realistic timeline for each?

1.

2.



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Accountability Worksheet

What do you need to be held accountable for?

What will you DO to hold yourself accountable?

- Positive trap?
- Accountability partner?
 - From group
 - Group leader
 - No friends or family

Who will you enlist to help with your goal?

What is their role?

Feedback and follow-up

- This session will help my business
- This session will not impact my business
- I would like to discuss this topic in more detail with the group leader
- I could use some coaching/consulting on this topic, please contact me