

Exit & Succession Planning

Consulting & Professional Services

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Get an exit and succession plan outline — options (sale, merger, internal succession, partnership), value drivers (recurring revenue, systems, brand, client concentration), how to prepare (reduce founder dependence, document, build team), and the process (valuation, buyers, deal). Take professional M&A, legal and tax advice. Fill in your details below.

Purpose of this tool & output

Plan a firm sale or succession

How the output is used

Use the guide to plan a firm sale or succession with value, timing and continuity in mind.

Important cautions

AI-generated outline; take professional M&A, legal and tax advice.

Companion documents

- Firm Growth Strategy
- Productised Service Designer
- Partnership & Alliance Strategy
- Niche & Positioning Strategy
- Scaling Roadmap
- Associate / Subcontracting Model

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.