

Business Transition Planning Guide



Planning your exit should feel like opening a door—not closing one. Whether you're preparing for retirement, seeking freedom from burnout, or simply ready to pass the baton, this guide is your starting point. At Midwest Equity Management, we're here to help you step forward with clarity and confidence.

Define Your Exit Goals

- Why are you considering a transition?
- What does a successful exit look like to you?
- What do you want your role to be post-transition?
- Do you want a fast sale or a gradual step-away?

Set a Timeline

- Ideal exit date (months or years out)
- Time needed to prep staff and systems
- When to start talking to potential buyers

Plan for People

- Who needs to be informed and when?
- Which staff could stay on or take leadership?
- What roles might a buyer need to fill?
- What happens with customers, vendors, and partners?

Understand Your Options

- Full sale vs. phased handoff
- Flexible deal structures (performance-based, collaborative exits)
- Internal transition (family/staff) vs. external buyer

Protect Your Legacy

- What values or culture do you want preserved?
- What are your concerns about the future of the business?
- Would you like to stay on in an advisory role?

Imagine What's Next

- What does freedom look like to you?
- Travel, family, new ventures, or simply rest—what excites you most?
- Let this plan be the first step toward your next chapter.

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