SELL

Sell Ready

The essentials for a business buyers can understand

Strengthen the evidence

- ☐ Maintain clean monthly financials that reconcile and tie to filed returns.
- ☐ Document owner pay, personal expenses, one-time costs, and proposed adjustments.
- ☐ Organize tax returns, contracts, leases, debt, payroll, ownership, and operating records.

Reduce buyer risk

- ☐ Reduce dependence on the owner for sales, operations, and key relationships.
- ☐ Address customer concentration and strengthen recurring or contracted revenue.
- ☐ Document the processes, roles, systems, and controls a buyer will inherit.

Prepare the transaction

- ☐ Choose a possible sale or transition window and work backward.
- ☐ Build a secure data room and resolve tax, legal, lease, or record issues early.
- ☐ Get an independent valuation or broker view before setting expectations.

Coordinate the handoff

- ☐ Align the accountant, CPA, attorney, broker, valuation, and wealth advisors.
- ☐ Plan the owner transition, employee and customer communication, and post-sale role.
- ☐ Model deal structure and tax consequences before agreeing to terms.

Mark N/A when an item does not apply. Flag anything uncertain for the right advisor instead of guessing.

Want a second set of eyes?

Bring the unfinished items to ACB. We will separate what needs attention now from what can wait.

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Educational guide only. Confirm tax, legal, valuation, and wealth decisions with the appropriate advisor.