

Business Advisory Quick Checklist

Completing this checklist is just the beginning.

Selling or transitioning a business requires more — it requires coordination, strategy, and leadership for you to have peace of mind.

While other professionals play an essential role in the process, Meridian goes the extra mile. We align your team, protect your interests, and keep the transaction moving toward a successful close so you can spend more time doing the things you want (and not have to worry about running your business).

 Our focus is simple: **you come first.**

While the goal is to have this checklist complete, the advisory process can begin before all the boxes are checked.

Count on Meridian to structure, prepare, and orchestrate the right path forward so your transition is executed with clarity and confidence so you can relax.

1. Personal Readiness

- Post-sale plan (*retire, reinvest, stay involved?*)
- Meridian Exit Advisory Session
- Family alignment (*we'll help!*)

2. Trusted Team

- Meridian Advisory Team
- Trusted Attorney
- Trusted CPA (*to minimize taxes*)
- Trusted Financial Planner (*where to put your proceeds*)

3. Financial Preparation

- *Meridian Business Valuation

**Please see the business valuation checklist for financial information*