



**Participant Information**

**Name** **Company**

**Email** **Date**

Scale: 0 = Not true today | 1 = Partially true | 2 = Mostly true | 3 = Fully true & consistent

**1. Founder Intent & Psychological Readiness**

- 1. I am clear whether my goal is partial liquidity, full exit, or legacy continuity.
- 2. I can imagine the company succeeding without my daily involvement.
- 3. I am comfortable shifting from decision-maker to advisor or steward.
- 4. I am prepared for employees to make decisions differently than I would.
- 5. My identity and purpose extend beyond my role as owner/operator.

**Section Total (0–15):**

**2. Financial Readiness & Risk Tolerance**

- 1. I understand how ownership transfer will affect company cash flow over time.
- 2. I am financially prepared for a phased exit, not an immediate payout.
- 3. I am comfortable balancing price optimization with business sustainability.
- 4. I have realistic expectations about valuation and deal structure.
- 5. I am willing to subordinate short-term gain to long-term continuity.

**Section Total (0–15):**

**3. Leadership Bench Strength**

- 1. At least one internal leader consistently makes sound decisions without my intervention.
- 2. Leadership accountability exists beyond personal loyalty to me.
- 3. Key leaders manage conflict and pressure without emotional escalation.
- 4. Leadership roles are defined by responsibility, not title or tenure.
- 5. I trust the leadership team to protect the company's long-term interests.

**Section Total (0–15):**



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#### 4. Governance & Control Awareness

1. I understand the difference between economic ownership and decision control.
2. I am open to formal governance structures.
3. I accept that shared ownership requires rules before disagreement arises.
4. I am willing to document exit and buy-sell provisions.
5. I prefer clarity over informal authority.

**Section Total (0–15):**

#### 5. Transition Discipline & Timing

1. I view ownership transfer as a multi-year process.
2. I am willing to tie equity transfer to milestones.
3. I understand my role will evolve in stages.
4. I value continuity for employees, customers, and lenders.
5. I am prepared to move deliberately even when momentum tempts speed.

**Section Total (0–15):**