Wealth Strategy Checklist for Founders

Preparing for a business exit is more than a transaction-it's a transition. This checklist is designed to help founders think strategically about their personal and financial positioning before, during, and after a liquidity event.

Why This Guide Matters

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Key Strategy Checklist

- Evaluate your current business entity structure for tax efficiency
- Understand Qualified Small Business Stock (QSBS) eligibility rules
- Coordinate estate planning strategies well before the transaction
- Review compensation plans, buy-sell agreements, and corporate records
- Estimate post-sale liquidity needs and future cash flow requirements
- Develop an asset allocation strategy aligned with new risk profile
- Explore charitable giving and legacy planning opportunities

Continue Exploring

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