**Succession Session Survey**

As you wait for this session to start – please complete this survey. It will be used to direct the discussion.

**If you’re a small business owner, how far away from a transition (exit) are you?**

\_\_\_ 3- 5 years \_\_\_ 5-8 years \_\_\_ 8+

**Have you taken any steps toward succession planning?**

\_\_\_ Yes \_\_\_ No

**Do you know of available resources in the region to help?**

\_\_\_ Yes \_\_\_ No

**Do you know the value of your business?**

\_\_\_ Yes \_\_\_ No

**In how many years would you like to be out of your business?**

\_\_\_ 3- 5 years \_\_\_ 5-8 years \_\_\_ 8+

**What type of business do you have?**

\_\_\_ Professional Services \_\_\_ Retail \_\_\_ Manufacturing \_\_\_ Hospitality \_\_\_\_\_\_\_\_\_\_ Other (please specify)

**How many employees do you have (include yourself)?**

\_\_\_\_\_\_

**Is the present owner carrying the bulk of the operations – in other words, could you (the owner) go on vacation for a month?**

\_\_\_ Yes \_\_\_ No

**Have you explored different strategies to protect yourself (business) such as “buy / sell” agreements?**

\_\_\_ Yes \_\_\_ No

**What’s a question you’re shy about asking in front of a group of strangers?**

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