

Worksheet 4: Best Case Scenario

Summarize your needs and goals:

Income:

Investment:

Involvement:

Legacy:

Values:

Summarize the needs and goals of others involved:

Family:

Managers:

Other owners:

What is necessary to ensure smooth management succession?

1.

2.

3.

How long will this process take:

Excerpted from “An Owner’s Guide to Business Succession Planning” and used with permission by Iowa State University Extension Value Added Ag Program. The complete guide can be ordered from the Ohio Employee Ownership Center:
<http://dept.kent.edu/oec/publicationsresearch/publicationresearch.htm>.