

Business Transition Readiness Assessment

Eight of ten business owners do not have a written transition plan, and nearly half of business owners have done no transition planning at all. Oftentimes, the plan is "I'll deal with it when I have to." Unfortunately, no matter what path they intend to go down (outside sale, gifting to family, sale to employees, etc.), leaving things up to chance will lead to an unfavorable outcome.

RKL HAS DESIGNED ITS BUSINESS TRANSITION READINESS ASSESSMENT TO EXPLORE FIVE KEY AREAS THAT ARE CRITICAL FOR A SUCCESSFUL TRANSITION:

- Owner's goals, objectives, needs, wants and don't wants and timeline
- Key constituents (inside and outside the business)
- Successor owner's availability of funds, capabilities and interest
- Transferability of key relationships, knowledge and financial support
- Establishment of a transition advisory team



AS A MEMBER OF THE DELAWARE VALLEY FAMILY BUSINESS CENTER, RKL IS OFFERING YOUR BUSINESS A COMPLIMENTARY 60-MINUTE CONSULTATION.

TO LEARN MORE, CONTACT:



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ABOUT RKL

RKL is a leading advisory firm that helps organizations and their leaders take on everyday challenges and opportunities while preparing them for whatever comes next in their business. We tap into a wide range of services – tax, accounting, financial management, workforce strategies, private wealth, technology and more – to deliver solutions that take organizations to the next level, however they define it.

600 TEAM MEMBERS

10 NATIONAL LOCATIONS

No. 1 PENNSYLVANIA-BASED
CPA FIRM, *Accounting Today*, 2023

No. 57 TOP FIRM IN THE U.S.
Accounting Today, 2023

No. 9 BEST PLACES TO
WORK, 2022

ENTITIES

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FAMILY BUSINESS CENTER