

Owner Succession *Questions.*

Your advisors have the financial plan covered.

This is for the part nobody scheduled.

Not just the transaction. The transformation.

Chuck Elliott

EXECUTIVE COACH | AUTHOR | SPEAKER

chuckandashley.com

A few thoughts *before you start.*

You've spent years building something with your name on it. You've had advisors for the financial side, the legal side, the operational side. This workbook is for the part nobody scheduled.

The questions here aren't designed to slow you down. They're designed to make sure you're carrying the full weight of this transition honestly — not just pushing through to the close. A good deal and a good transition are not the same thing.

Take your time with each question. There are no right answers here. Only honest ones.

If something came up, that's worth a conversation.

Most business owners spend years planning the financial side of succession and almost no time preparing for the personal transition. The identity shift. The grief. The marriage recalibration. The question of who you are when the title is gone.

That's the work I do. Not instead of the financial planning — alongside it. Because the owners who navigate this best aren't just prepared for the deal. They're prepared for what comes after.

When you're ready to talk about what came up, I'd welcome that conversation.

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chuck@chuckandashley.com | 812-598-1845

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