Are You Succession Ready?

12 Questions to Ask Before You Choose a Successor | No valuation pitch. No obligation. Just clarity.

1. Do you know who would serve your clients on day one if you stepped back tomorrow?
   ☐ YES ☐ NO ☐ NOT SURE
2. Have you identified what happens to your team—roles, compensation, continuity?
   ☐ YES ☐ NO ☐ NOT SURE
3. Do you know the difference between selling your practice and transitioning it?
   ☐ YES ☐ NO ☐ NOT SURE
4. Have you mapped your client demographics and concentration risk?
   ☐ YES ☐ NO ☐ NOT SURE
5. Do you know which clients would need the most careful introduction?
   ☐ YES ☐ NO ☐ NOT SURE
6. Have you documented your processes, or do they live in your head?
   ☐ YES ☐ NO ☐ NOT SURE
7. Do you know what makes your practice attractive to a successor?
   ☐ YES ☐ NO ☐ NOT SURE
8. Have you thought about timing—when you want to slow down vs. when you want to stop?
   ☐ YES ☐ NO ☐ NOT SURE
9. Do you know what "fair value" means to you beyond the headline number?
   ☐ YES ☐ NO ☐ NOT SURE
10. Have you considered phased transition, merger, or partnership instead of an outright sale?
    ☐ YES ☐ NO ☐ NOT SURE
11. Do you know what you want your reputation to look like after you leave?
    ☐ YES ☐ NO ☐ NOT SURE
12. Have you had a confidential conversation with anyone about what happens next?
    ☐ YES ☐ NO ☐ NOT SURE

If you answered **"no"** or **"not sure"** to three or more, a confidential Successor Fit Review may be useful. No valuation pitch. No obligation. If we're not the right fit, we'll tell you.

Request a Confidential Successor Fit Review

Arden Hill Partners
Hugh.mosley@belpointewealth.com