F.G. PFISTER



Checklist for an Initial Assessment

«Am I ready to pass on my business?»

Checklist

A business transition rarely begins with a fully developed plan. More often, it starts with questions: Where does the company stand? What do I want personally? What should happen to the employees, location, and brand? Our checklist guides you through the most important points in about thirty minutes. It does not replace a trust company or a business valuation, but it helps you prepare for an initial conversation.

Me and my family

1 Have I clearly defined my personal goals and expectations regarding my succession?

2 Have my family and other key stakeholders been informed of my intentions?

3 Has my specific role been clearly defined following the transition?

Business & Leadership

4 Can the company function even without my day-to-day involvement in operations?

5 Are there people within the company who could take on leadership roles in the future?

6 Are key personnel, critical expertise and key responsibilities documented and safeguarded?

Strategy & Future

7 Do I have a clear vision for the future of our employees, our location, our culture, and our brand?

8 Have I realistically evaluated possible internal and external succession options?

Finance & Enterprise Value

9 Are annual financial statements, current financial figures, and budget and planning documents available?

10 Do I know the key value drivers of my company, and do I have a general idea of its value?

Legal, Organizational & Documentation Matters

11 Are ownership structures, bylaws, and key contracts up to date, documented, and readily available?

12 Are the organizational chart, core processes, IT systems, and other important company documents clearly documented?

Process & Preparation

13 Will I receive guidance from qualified professionals (trustees, legal consel, or members of the board of directors)?

14 Have I established a realistic timeline for the succession process?

PERSONAL CONTACT PERSON

You speak directly with the person who will be sitting acrosss the table from you later in the process.

Felice Facchini
Chairman of the Investment Committee,
Member of the Board of Directors

Phone: +41 58 521 45 39
Email: felice.facchini@pfisterholding.ch

