7 Steps to Check Off Before Selling

THE MACKINS AT BLEAKLEY

We work with the visionaries - environmentally conscious business owners who want to make a difference. Chances are, you are one of them and you're planning your future. Whether you're doing your due diligence and making sure the end goal is mapped out far in advance or you've changed course and a new goal is on the horizon, it's never a bad time to check off the below list.

1 Visualize Your Plan

While it may sound like an unnecessary step, visualizing your exit strategy will allow you to answer the necessary questions.

2 Understand Your Industry and the Market

No one knows what the future brings but as a business owner, you know the importance of foreseeing changes and making decisions based on them. Exiting your business is no different.

3 Create a Group of Trusted Professionals

Having a group of professionals you trust is the base for a stong team.

4 Share Your Vision with Your Family

Share your timeline, plans and overall goals and if there are ways they can support you.

5 Prepare Your Exit Strategy

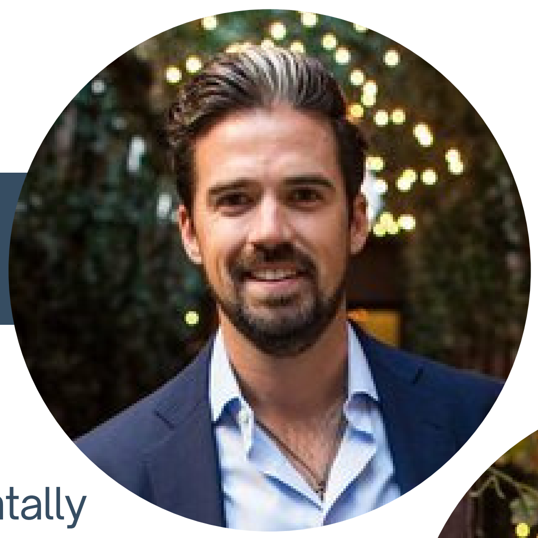
With a vision, knowledge, and team behind you, the next step is to begin putting pen to paper.

6 Clean Up Your Business Financials

An internal audit can provide you with insights into the steps needed to ensure the financials will get you to the valuation you want

7 Plan Out Your Personal Finances

You'll need a solid roadmap to work towards reaching the goals in the next chapter of your life.



FOR US, IT'S PERSONAL

Meet Christopher and Michelle Mackin

A brother-sister team providing wealth management strategies to individuals and leadership teams of environmentally conscious corporations

CHRISTOPHER J. MACKIN, CFP®
Christopher Mackin is a Partner at Bleakley Financial Group. As a CERTIFIED FINANCIAL PLANNER™ with over 16 years of experience, Christopher melds his passion for conservation and knowledge of the markets to create holistic financial solutions for clients.

MICHELLE MACKIN
Michelle Mackin is a Wealth Advisor at Bleakley Financial where she provides one-on-one wealth management planning for CEOs and affluent individuals.

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