**Exit Survey for Real Estate Agents**

Are you thinking of retiring in the next few years? Here are some questions to ask yourself to see how prepared you are to make that leap.

**About your business**

1. Do you have a database that’s up to date so you can pass clients on with confidence?
2. Do you have a marketing plan that you have implemented (via contact management) to keep in contact with your best sources of business—and the system to pass this on to your buyer?
3. Do you have written systems for how you work? (listing, buyer, after sale, etc.)
4. Do you have a business plan that someone else could follow as they took over your business?
5. If you have staff: Do they have written systems they follow that convey how you work and what’s important to you? (to pass on to your buyer)
6. Do you have a profit and loss statement and review it monthly? Do you operate from a budget?

**Financial**

1. Do you have a savings plan that you know will return what you need to retire?
2. Do you know where/when you want to retire?

**Process**

1. Do you know the steps you need to take (and when to take them) to get your business ready to sell?
2. Do you have a plan for how to structure your buy-sell agreement?

We are creating a series of courses to help those who want to create an exit plan. Do you have concerns not listed here? Please contact me at carla@carlacross.com and let me know, so I can be sure to include these concerns in this series.

Thank you. Carla Cross carla@carlacross.com [www.carlacross.com](http://www.carlacross.com)