

“I’ve been thinking about selling the business.”

When that sentence lands on your desk, your client is asking the professional they trust most what to do next. E² Exits gives you a confidential, credible answer: a specialist process that protects the client and keeps the relationship where it belongs, with you.

70–80%

of a typical owner's net worth is the business.
The exit is the retirement plan

80%

of listed businesses never find a buyer,
usually for fixable reasons

12–36 mo

of preparation separates exits on the owner's
terms from the market's

THE HANDOFF PROTOCOL

01 A quiet introduction · routed by you

An email intro or shared call. No forms, no listing pressure. Clients can start privately with the free E² Exit Score™, a five-minute readiness assessment.

02 A confidential consult · under NDA

An honest read: sale-readiness, a defensible valuation range, a realistic timeline. If the right answer is “wait two years,” that is what they hear.

03 You remain the trusted advisor

Milestone updates throughout. Tax structuring, legal work, and wealth planning route back to your desk. The client stays yours.

YOUR CLIENT GETS

- Confidentiality by design: NDA-first, no public listing
- A defensible valuation that survives due diligence
- Active buyer outreach, not list-and-wait
- A free, private first step: the E² Exit Score™

YOU GET

- A safe answer to a hard question: exits only, licensed
- No competition with your practice: tax, legal, wealth stays yours
- Milestone communication: engagement, offer, close
- Reciprocity: our clients constantly need advisors

PARTNER STANDARDS · IN WRITING, BEFORE THE FIRST REFERRAL

- 01 Confidentiality is absolute.** We never disclose that your client is exploring a sale, to anyone, at any stage.
- 02 The relationship stays yours.** We never offer tax, legal, or wealth services. Preparation tools can be delivered under your own brand.
- 03 Honest advice, even when it costs us.** Clients who aren't ready hear it plainly, with a preparation roadmap.
- 04 You're informed at every milestone.** Engagement, buyer interest, offer, closing: you hear it from us first.
- 05 Referral recognition, done properly.** Structured per state licensing rules and your profession's ethics, discussed on the intro call.