



# FREE SERVICES FOR BUSINESS OWNERS

## Understanding Exit Planning Process & Options

**As you think about the future,  
are you –and your business – ready?**

As many as 28,000 Massachusetts small businesses could sell or close over the next several years. For every business that sells, 9 will close.

With funding from the **MA Growth Capital Corporation**, CDI provides **free feasibility study** for eligible business owners\* who want to plan begin to plan for their eventual exit.



*\*Eligible businesses have 2 – 20 Full Time Equivalent (FTE) employees that are from underserved constituencies, including: businesses located in economically disadvantaged urban/rural communities or a Gateway City; Low-to-Moderate Income Entrepreneurs; women, minority, veteran, disabled LGBTQ+, immigrant business owners.*

### Your study will include:



**Financial assessment:** a financial analysis and assessment of what your business is worth



**Business assessment:** a review of business management and marketing strategies



**Workforce assessment:** an analysis of leadership strengths, weaknesses and opportunities

**Each assessment will include recommendations that could make your business more profitable, sustainable and resilient, and better position you and your business for your eventual exit.**

### Study facilitated by:

**Rob Brown:** exit planning educator & nationally recognized expert of employee ownership transitions.

**Bill Jenkins:** has many years of experience in business governance, management and finance.

**Andy Danforth, CPA:** specializes in business financial management, analysis and valuation.

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or go to  
[cdi.coop/BIZstudy](http://cdi.coop/BIZstudy)

Looking for more support?

Check out the **Participatory Management Initiative**

Enroll in this **FREE** workshop series.

These workshops will help owners and managers develop

skills that create more engaged employee and improve profitability, hiring and retention. [More info @ cdi.coop/PMI](http://cdi.coop/PMI)



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