



Quick Valuation Checklist

SIMPLE DIAGNOSTIC OWNERS CAN SELF-ASSESS IN 5 MINUTES

Before you spend time and money on complex valuation models, answer these quick questions. They reveal if your “number” is likely accurate, inflated, or leaving money on the table.

- Do you know your adjusted EBITDA for the last 3 years?
- Can you explain the source of your last 5 years of growth?
- Do you have more than 20% of revenue tied to one customer?
- Do you have signed, transferable contracts with your top clients?
- Do you know your industry’s current multiple range?
- Is your leadership team capable of running the business without you?
- Do you have a written succession or exit plan?

6-7 checks = You’re in the top tier, likely undervaluing yourself.

3-5 checks = Significant value gaps exist. Fixable with time.

0-2 checks = Risky. Valuation may be inflated and fragile.

CTA: “Reply and I’ll walk you through how to expand this checklist into a true valuation roadmap.”