

Real estate succession planning assessment

These questions will help real estate business owners, developers and investors determine their readiness for retirement.

On a scale from 1 to 10 (0 = not at all; 10 = extremely)

1. How prepared are you for transitioning out of the real estate business?										
0	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. How equipped are your retirement assets to meet ongoing cash-flow needs?										
0	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. How well can your retirement assets withstand inherent risks? (e.g., economic, interest, asset concentration)										
0	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Does your transition plan include transferring responsibilities to: (select multiple if needed)	
<input type="checkbox"/>	Family member
<input type="checkbox"/>	Key employee
<input type="checkbox"/>	Third-party manager (REIT/fund)
<input type="checkbox"/>	Other _____ (please add response)
<input type="checkbox"/>	No one designated

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5. How significant is the potential income tax burden or lack of liquidity affecting your transition plan?										
0	1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. Have you begun working with legal and tax advisors to help plan for the most effective solution to your transition plan?	
<input type="checkbox"/>	Yes
<input type="checkbox"/>	No

What's your transition score?

Our professionals can help you learn more about what your transition assessment score means. We have deep experience helping real estate business owners, developers and asset managers sort through the issues to create the right action plan for your next chapter. Contact us to learn more.