

## From Idea to Exit

### START



#### LEVEL 1: STARTUP

- Generate Your Idea
- Gather Your Team
- Legally Form Your Business
- Protect Your Intellectual Property
- Early Market Research
- Draft Your Business Plan  
*(financials, marketing, development, sales etc.)*

#### LEVEL 2: ACCELERATE

- PITCH – Get Feedback
- Design, Test, and Launch Startup
- Refine Your Pitch

#### LEVEL 3: FUNDING

- Make Connections  
*(Angels, Seed Funds, VCs)*
- Generate Angel Investments
- Generate Seed Capital/Funding

#### LEVEL 4: SCALE

- Develop Your Product
- Distribute Your Product
- Assemble Your Dream Team
- Retain Key Talent
- Pay Attention to Public Relations
- Raise Venture Capital/Alternative Financing

#### LEVEL 5: OPERATIONS

- Consider Real Estate
- Incentivize Executive Team
- Develop Strategic Alliances

#### LEVEL 6: PREPARE TO EXIT

- Consult Your Accountant
- Consider Any Equity Compensation Issues
- Consider Tax Implications of Exit
- Prepare Compensation Structure

#### LEVEL 7: EXIT

- Consider Estate Planning
- Create Succession Plan

**Helping Businesses  
On Their Road to Success Since 1917**

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### FINISH