

Year-One Enterprise Value Checklist

Build a practice buyers want to buy

Revenue Quality

- 85% or more of my revenue is recurring or fee-based
- Less than 15% comes from one-time transactions
- My revenue would continue for 90 days if I stopped selling

Documentation

- A new advisor could deliver my service model from documentation alone
- Every recurring client touchpoint has a written process
- Another advisor could step into my systems quickly

Client Diversification

- No single client exceeds 10% of my revenue
- My top 5 clients represent less than 25% of total revenue
- Losing my largest client would not destabilize the business

Founder Independence

- Clients have relationships with my firm, not just me personally
- Team members make decisions without my approval daily
- Revenue comes from multiple producers or systematic sources

Financial Clarity

- A buyer could understand my business from my financials alone
- I know my profit margin and can explain how I calculated it
- Revenue, expenses, and client data are clean and auditable

The Buyer Test: *Would a buyer pay more because you built this?*

Learn how Greatness Lab helps advisors build enterprise value from day one.