



“What If” Ownership Worksheet: A Simple Framework to Explore Franchise, Acquisition, and Independent Businesses

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The news cycle keeps delivering the same message: corporate roles are compressing and the “What If” questions are getting louder.

This worksheet turns those questions into a structured exploration. It walks you through the 5 key resources every executive should use when considering life outside the corporate ladder.

Take 20–30 minutes. Be honest. This is your first empowering step toward clarity and control.

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Exec2Owner – When Corporate Life Ends, What's Next?
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1. Structured Self-Assessment Rate yourself on a scale of 1–5 (1 = low preference, 5 = high preference)

- Risk tolerance: I prefer proven systems over high uncertainty _____
- Timeline to revenue: I need cash flow within 6–12 months _____
- Control level: I want maximum decision-making freedom _____
- Capital runway: I can comfortably deploy \$X in the next 12 months _____
- Experience leverage: I want to use my corporate expertise daily _____

Total Score Insight: _____

The highest-score path is the strongest starting point for exploration.

2. Funding Reality Check

- Months of living expenses saved: _____
- Available transition capital: \$ _____
- Potential funding sources I will research: ☐ SBA 7(a) loan
☐ 401(k) rollover (ROBS) ☐ Home equity ☐ Seller financing
☐ Personal savings



3. Business Fit Evaluator List 2–3 business types that match your background:

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Quick research prompts:

- Franchise directories to review:

- BizBuySell or Axial listings to browse:

4. Legal & Structural Roadmap Key questions to discuss with a professional:

- Preferred entity structure (LLC, S-Corp, etc.):

- Personal liability concerns:

- Tax implications I need to understand:



5. Human Guidance & Accountability

- People I will speak with this month (mentors, owners, advisors):
 - a.
 - b.
- Date I will book a discovery call or peer conversation:

Next Step: Once completed, book a free 15-minute discovery call with me at Exec2Owner. We'll review your worksheet together and map realistic next steps — no pressure, no commissions.

Download this worksheet again anytime at exec2owner.com/worksheet