

Mindsets	1	2	3	4	5	6	7	8	9	10	11	12	Score Now	Goal
1 What do you want?	You have fleeting thoughts of what you want but the day to day business challenges capture your attention 24/7.			You want to be well planned...and think you may be, but are not sure.			You are prepared for business opportunities, contingencies & you actively manage your objectives & key results.			The advice you are receiving and the decisions you are making align with your vivid vision of your business and personal future.				
2 Business & Personal Risk Management	You spend little time, if any, annually reviewing your business and personal risk management plan			You feel OK about your business and personal risk management plan and think it could be better.			Your carefully constructed risk management plan gives you the peace of mind to focus on your business, your customers and your family.			Your risk management team reviews & recommends coverages to ensure you, your assets & those you care about are adequately protected.				
3 Management Talent	You worry that the people you rely on may be underpaid and you do not have a deep bench.			You have a pretty good idea of your next in line management talent...and hope they stick around.			Your management talent pipeline is filled with those whom you are confident to protect the integrity, cash flow and value of your business.			Your strategies to attract, retain & reward your management talent strengthen your business model and improve your bottom line.				
4 Benefits Plan	You feel your employees do not appreciate your current benefits plan.			You are frustrated with the level of benefits you feel you need to provide to find & keep good people.			You intend to help your employees be better prepared for life's unexpected contingencies & their own retirement.			You are proud of your well rounded employer & employee paid benefits as they are valued by your employees & it shows you care about them.				
5 Transition Readiness	You are not ready for a voluntary nor an involuntary exit from your business.			Your buy-sell agreement, which has not been reviewed in years, <u>may</u> equitably handle just about any "trigger event" for all parties involved.			Your "life after business" game plan incorporates your physical, financial & cognitive health, & your social, fun, spiritual & purpose aspirations.			You and your company are "transition ready," your buy-sell agreement will work as intended & all parties agree with the company's valuation.				
6 Pre-Liquid Asset Management	You believe your single minded focus managing your company is the same as managing your personal wealth.			You have a consistent, accurate & trusted system in place to value your company.			The wealth locked up in your private company represents the majority of yours & you'd like to know how to manage and realize that wealth.			You have focused effort, energy, tools and resources to accomplish diversification and prepare for the ultimate transition of your company.				
7 Written Estate Plan	You do not have one.			Your Will, Power of Attorney and Trust documents probably need to be updated as its been years since they were addressed.			You feel confident that your estate plan reflects your values & benefits the people, events & things you care about.			Your estate plan is a true reflection of you & your loved ones, is reviewed annually & communicated with those you care about.				
8 myAdviser Roundtable	Your advisers do not know each other, or have never had a joint conversation about you and your company.			You have thought about establishing a board with outside directors but just haven't pulled the trigger yet.			Your board and trusted advisers help you articulate and focus on your vision, goals, strategy and tactics.			Your advisers collectively meet at least once each year with an established agenda to help you leverage your focus for bigger and better progress.				
Scorecard														