

The Confident Survivor's™ Scorecard				Name									Date	In 90 Days
				1	2	3	4	5	6	7	8	9	10	11
1	Intention	You pay more attention to your next vacation than you do to one of life's inevitable transitions.	Your estate planning documents are complete and up to date but the conversation has pretty much stopped there.	You feel content with your preparation & feel your survivor will be fine without you.	You will be a confident survivor with the clarity & confidence to make smart decisions for yourself & those you care about.									
2	Awareness	You have a hard time being aware of your present emotional, physical and mental health concerns let alone that of your future concerns.	You find it somewhat difficult to address personal issues beyond what appears to be the fact facts.	You are aware of some challenges widow(er)'s face and feel pretty good about how you may handle it yourself.	You are prepared for the daily struggles, the emotional, physical & mental health issues that may arise as a new widow(er).									
3	Inventory	You do not know what you own, what you owe, where it's located & what to do with it if/when you are alone.	You are pretty sure you have a handle on what you own, owe & where it is, but you are not sure of your long term income sources.	Your assets, liabilities, income sources, insurances & beneficiaries have been inventoried & are up to date.	You know your adviser, all of your resources and obligations & what to do with them as a Confident Survivor™.									
4	Life After Business	Your LAB Plan™ (Life After Business) is to get the proverbial "gold watch", play lots of golf & spend time with your family.	You need to button up your LAB Plan™ because whether you exit with the gold watch or they carry you out feet first, the future is in disarray.	Your premature incapacity/death triggers a successful LAB Plan™ for your survivors reflecting your wishes.	Your LAB Plan™ incorporates both spouses physical & cognitive health, social, fun and purpose aspirations.									
5	Money	You feel this topic is taboo & you don't want your kids to know how much money you have.	You or your children seemingly avoid the topic every time it's brought up & brush it off for a later discussion.	You know you have the resources for a long life, incapacity &/or an early death but your spouse & children may not have a clue.	Your family knows your cash flow status for a long life, an early death &/or an incapacity requiring extended end of life care.									
6	End of Life Plan	You have not articulated how you would like to be cared for if you are unable to make health care decisions for yourself.	You have a living will, are not exactly sure what it says, and you have yet to share it with your children.	You & your Health Care Agent have discussed your healthcare wishes.	You feel at peace as your written health care directives accurately reflect your wishes, expectations & your family is on board.									
7	Courageous Conversations	You intend to have the conversation about your future & end of life/health care wishes with your family some day.	You have broached the topic of your future & end of life health care wishes but have been too busy to complete it.	You think your spouse & your children know what is expected of them if/when they are faced with your unexpected incapacity or death.	You are confident knowing your family will carry out your written future & end of life health care & legacy wishes as you desire.									
8	Ultimate Dress Rehearsal	You prefer not to think about your spouse's premature death or incapacity so you don't address it.	Your legal documents are up to date and you think you have the resources for a long life, an extended health care event &/or an early death.	Your legal, financial & health care documents & directives are up to date, signed & have been communicated to those you care about.	Your annual fire drill covers life's financial contingencies & you, your spouse & advisers are content with how your "final act" will play out.									
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