

Your 2nd-Half Game Plan™ Scorecard

Shape your images of future possibilities into your reality

Date Now	Date Next

Mindsets		1	2	3	4	5	6	7	8	9	10	11	12	Score Now	Score Next				
1	What does your future look like?	You have fleeting thoughts of what you want but day to day business challenges capture your attention 24/7.			You think you know what you want your future to look like but just haven't gotten around to planning it.			You want a game plan for your life's 2nd-half to be happy, connected and on purpose.				You have a clear picture(s) of who you will be, what you will do & what you will have in your future.							
2	Asset Protection Plan	Your idea of an asset protection plan is mass marketed insurance policies for your auto, home, business, life & health.			Your plan may be OK, but you are unaware of non-traditional solutions for unexpected disruptions.			Your plan has been assembled after a thorough analysis of traditional and alternative solutions.				Your optimal asset protection plan minimizes exposure & maximizes your savings to protect & grow your resources.							
3	Grow Enterprise Value	You don't have the people, the process nor the systems in place to grow the value of your business.			You have a pretty good idea of your next-level leaders...and hope they stick around to help you grow enterprise value.			Your pipeline is filled with those whom you are confident will grow the value of your company, protect it's integrity & cash flow.				Your strategies to attract, retain & reward your next-level team strengthens your business model & improves your bottom line.							
4	Business Continuity	Your company may need to be sold for less than full value if you are unexpectedly taken out of the picture.			You think your survivors will equitably handle any trigger event such as death, disability, incapacity, divorce, etc.			Your business agreements, valuation formula, funding & next level leaders are in good shape.				Your written instructions will leave your company in the best hands if you don't make it to the finish line.							
5	Financial Life Plan	You are not ready...you don't know if your business & personal resources will support your life's 2nd half.			You would like to be well planned...you are just not sure how to tell if you are.			Your plan may set you up to be happy, connected & on purpose to impact the events & people you care about.				You have goals, resources, advice & a plan to shape your images of future possibilities into your reality.							
6	Estate Plan	You do not have a written estate plan.			Your estate planning documents probably need to be updated as its been years since they were addressed.			Your estate plan reflects your values & benefits the people, events & things you care about.				Your plan is clear, will carry out your intentions & is flexible to adopt to family & regulatory changes.							
7	Exit Path	You have a hard time envisioning how you will leave your company on your terms.			Your exit path consists of a buy-sell agreement, life insurance & a guesstimate of your business value.			Your multi-year, tax efficient exit plan allows you to leave when you want, for the money you need, to your chosen successor.				Your exit path aligns with your vision, saves you money, time, increases free cash flow and business value.							
8	Advisor Team	You rely on you, rules of thumb & online resources to coordinate your company & family wealth management.			You quarterback multiple advisors & are starting to feel frustrated as it takes time to stay on top of it all.			Your lead advisor coordinates your company & family wealth management.				Your advisor team's annual agenda allows you to keep moving forward for personal, family & company growth.							
Your Total Score																			

This scorecard is unique to my experience serving business owners, like you, who want the 2nd half of life to be happy, connected and on purpose.

Our unique process is called "Your 2nd-Half Game Plan." It is a business owner centric process where we facilitate your best thinking to be better educated, organized and prepared for your life's 2nd-half, on your terms.

The real benefit is you will keep moving forward with increased clarity about your future, greater confidence today and the expanded capability to impact the people and events you care about.

Scorecard Instructions

(A) Read through the four statements for each mindset. Give yourself a score of 1 to 12 based on where your own mindset falls on the spectrum. Put each mindset's score in the "Score Now" column at the right and then add them up.

(B) Next, think ahead twelve months and write the score you would like to reach by that date in the "Score Next" column and add them up .

When you compare the two scores you will see where you want to go in terms of your achievements and ambitions.

Awareness builds momentum and momentum builds confidence to shape your image of future possibilities into your reality.

Share this scorecard with your Advisor(s) to shape the conversations to improve your score.

Good luck!

A handwritten signature in blue ink, appearing to be 'Patrick', written in a cursive style.

p.s. Google "Your 2nd-Half Game Plan Scorecard" for additional copies...or share it with someone you care about.