

Your 2nd-Half Game Plan™ Scorecard													Your Name		Date Now	In 90 days
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 don't really know what you want...the vision of your future is cloudy.			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 & on purpose.			Your best thinking paints a clear picture of who you will be, what you will do & what you will have in your future.						
2 Your Game Plan	You are unaware of any seeds of financial challenges and missed opportunities.			You know things aren't quite right and some things need to be done...maybe some day when it hurts more.			You feel your game plan is working and you are working your plan.			You are prepared for a long life, an early death, incapacity & other important transitions that life's 2nd-half may throw you.						
3 Trust	You don't feel comfortable sharing your goals, objectives & financial affairs.			You have a difficult time trusting others & are quite selective with whom & what you share.			Your Advisor(s) ask good questions allowing you to share your hopes, dreams, fears, goals & objectives with them.			You trust your Advisor(s), their confidentiality & their advice which is in the best interest of you & your loved ones.						
4 Organized	You have a vague idea of your net worth, where all of your documents are & you plan to get organized some day			You know where most of "your stuff" is - some at home, some at work, some online & some you have yet to track down.			Your assets, income plan, important documents & beneficiary arrangements are organized & up to date.			You and your advocates may access your key personal information 24/7/365 via your HIPPA compliant online portal.						
5 Confidence	You are not very confident about your future.			You would like to be more confident about being on track to reach your goals.			You feel pretty confident about your current game plan.			You have increased clarity about your future, greater confidence & the capability to reach your goals & honor the commitments you've made.						
6 Your Planning Team	You rely on you, generally accepted rules of thumb & bookstore/online resources as your guide.			You are not sure you have the right people in place.			You are satisfied with the team of advisors you have assembled & think they are doing a good job for you.			Your enterprising advisory team assembles annually to update & identify planning opportunities for you & your loved ones.						
7 Life Transitions Reality Check	When a major life transition event/crisis occurs, you &/or your family may be met with shock, confusion & grief.			You've done some planning but a major transition event may strike an emotional blow to whomever has to deal with it.			You & your family are better prepared for major transition events as a result of your occasional family meetings.			Your "dress rehearsal" reveals your family is prepared to make clear decisions before, during & after life's transitions.						
8 Results	You are not getting the results you think you should be getting with your planning, or lack thereof.			You are getting some of the results you had expected.			You are achieving your desired results & have a system in place to monitor your progress.			Your Advisors make your life simpler & keep you focused on what is important to you & those you care about.						
Your Total Score																