FINANCIAL FREEDOM™ BUSINESS OWNER SCORECARD

Have you set clear goals and built a vision for your business?

l do not have clear	1	2	3	4	5	I have clear goals
goals or a vision for	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	and a vision for
my business						my business

Have you engaged in any exit planning or succession planning strategies?

I have not engaged in						I have exit planning
any exit planning or	1	2	3	4	5	and succession
succession planning strategies	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	planning strategies in place

Have you conducted a formal business valuation?

I have not conducted	1	2	3	4	5	I have worked
a formal business				-	•	through a formal
valuation	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	business valuation

Do you have a written agreement that protects you & your business in the event of death, disability, divorce, distress or disagreement?

l do not have a	1	2	3	4	5	l have a written
written agreement in place to protect my business	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	agreement in place to protect my business

Do you meet regularly with your advisory team to ensure your strategies are current given changes to your business, family or the laws?

l never meet with my advisory team to review my plans	1	2	3	4	5	I meet regularly with my advisory team to ensure my plans are current & efficient
Add Column Totals:						Your Score:

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