

FINANCIAL FREEDOM™ BUSINESS OWNER SCORECARD

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

I do not have clear goals or a vision for my business	1	2	3	4	5	I have clear goals and a vision for my business
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

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

I have not engaged in any exit planning or succession planning strategies	1	2	3	4	5	I have exit planning and succession planning strategies in place
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Have you conducted a formal business valuation?

I have not conducted a formal business valuation	1	2	3	4	5	I have worked through a formal business valuation
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

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

I do not have a written agreement in place to protect my business	1	2	3	4	5	I have a written agreement in place to protect my business
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

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

I 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
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Add Column Totals: _____ _____ _____ _____ _____ **Your Score:** _____