

A Quick “Fourth Quarter” Fitness Checkup

(for Family Business Pioneers—Business Continuity and Succession Planning)

Profitable Growth

Family Business Leaders/Pioneers are telling us they want an effective way to overcome the rapidly accelerating “perfect storm” of business model, culture, demographic and technology changes affecting the business life and profits of all companies today.

Do you have a **Profit Plan** which deploys a carefully selected, well-informed, very active, decisive, Profit Strategy Team that you are highly certain will keep your company in a growing, profitable business model?

Priority: High Mid Low

- Yes. Got It.
- No. Not Yes.
- Not Sure
- Look Into It

Wealth Protection

Family Business Leaders/Pioneers are telling us they want to protect and preserve their Company and their personal wealth from owner and family disputes, lawsuits, loss of key personnel, divorce, bankruptcy, substance dependency and reckless spending issues.

Do you have a **Protection Plan** that you are highly certain will preserve and protect your personal, business and financial wealth for you and your loved ones?

Priority: High Mid Low

- Yes. Got It.
- No. Not Yet.
- Not Sure
- Look Into It

Lifestyle Continuity

Family Business Leaders/Pioneers are telling us they want more from their Estate Plan. They want lifestyle continuity for themselves and their families and business continuity for their family business.

Do you have an **Estate Plan** that you are highly certain will provide the lifestyle continuity, investment control and “bloodline” success you want for you and your loved ones?

Priority: High Mid Low

- Yes. Got It.
- No. Not Yet.
- Not Sure
- Look Into It

Personal Freedom

Family Business Leaders/Pioneers are telling us they want freedom on their terms. They are telling us they didn't go into business to run a business. They went into business to achieve freedom. And they want their advisors to know how to work together with them to achieve this.

Do you have a **Succession Plan** that you are highly certain will achieve the financial and personal freedom you want for you and your loved ones?

Priority: High Mid Low

- Yes. Got It.
- No. Not Yet.
- Not Sure
- Look Into It