

Your Life After Business 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	Your Life After Business (LAB) Plan	You have no clue what your "Life After Business" (LAB) Plan entails.	You think you know what you want your LAB Plan to look like, but you just haven't gotten around to planning it out.			You are prepared for your future lifestyle enhancements &/or business opportunities.			Your LAB Plan aligns with your vision of future possibilities & your process to transition them into your reality.										
2	Quantifying Resources	You do not have an accurate accounting of the resources you may need to support your post business lifestyle.	You think you'll have enough net business & personal resources to support your LAB Plan lifestyle.			Your best calculations reveal you will have adequate net business & personal resources to support your LAB Plan lifestyle.			Your professional evaluation of free cash flow + net business valuation + personal resources = financially secure LAB Plan lifestyle.										
3	Leadership & Business Growth	You are pessimistic about the people, process & 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 business value.			Your pipeline is filled with those whom you are confident will grow business value, protect it's integrity & cash flow.			Your commitment to attract, retain & reward your next-level team proves to strengthen your business & improve your bottom line.										
4	Exit Path	You feel you are losing the game of how you will leave your company on your terms.	You would be surprised if you needed more than a buy-sell agreement, life insurance & a guesstimate of your business value.			Your exit plan may allow you to leave when you want, for the money you need, to your chosen successor.			Your tax efficient exit path aligns with your vision & saves you stress, time, energy & money.										
5	Contingency Plan	Your business may be gone if you are unexpectedly taken out of the picture.	Your family & business may be threatened if you are unable to continue your role in your company.			Your family & leadership team know who to contact & what steps to take to continue your business if you tipped over today.			Your commitment that your company thrives beyond you is evident to your advisors, family, employees, customers & vendors.										
6	Financial Life Plan	You are not ready for your life's next phase...nor are you ready for an involuntary or voluntary exit from your business.	You would like to be well planned, you are just not sure how to tell if you are.			The advice you receive & the decisions you make are tracking with your written game plan.			Your enterprising plan includes your physical, financial & cognitive health, as well as your spiritual, fun, social & purpose aspirations.										
7	Estate Plan	You do not have a written estate plan.	Your estate planning documents probably need to be updated as it has been years since they were addressed.			Your estate plan reflects your values, protects your assets & benefits the people, events & things you care about.			You are optimistic your estate plan will optimally carry out your wishes, is reviewed annually & communicated with your loved ones.										
8	Your Legacy	You feel you don't have any principles, philosophies &/or achievements for future generations to remember.	You wish you were better prepared to impart words of wisdom, encouragement & life's lessons to those you care about.			Your heirs know what you have to give in your head & your heart in addition to financial assets.			Your definition of wealth swells from financial to emotional as you leave meaningful, enduring communication & memories.										
Your Total Score																			