

Your Roadmap to Sustainable Wealth

By The FiscalDoctor®



Name: _____

As you build your personal and financial legacy, where is there a better, faster, safer road? On a gradient from 1 (Strongly disagree) and 10 (Strongly agree), select where you are inside the colored gradient. Use X = now or "n/a" + not applicable to spotlight and record your priorities and plans on each item below?

Strongly disagree  Strongly agree

1. **Health:** your physical, mental, emotional and spiritual health is in great shape.

Strongly disagree  Strongly agree

2. **Relationships:** your life partner, family and friends enthusiastically support you.

Strongly disagree  Strongly agree

3. **Stress:** you have fun and sleep well at night.

Strongly disagree  Strongly agree

4. **Vacations:** you plan ahead, take at least four to six weeks per year, and feel relaxed and recharged.

Strongly disagree  Strongly agree

5. **Time and Talent:** you utilize your natural talents, are focused and productive, and enjoy free time.

Strongly disagree  Strongly agree

6. **Wealth:** you know your financial net worth, review it annually, and it is steadily increasing.

Strongly disagree  Strongly agree

7. **Finances:** you are organized and structured with clear goals, and have confidence in your financial plan.

Strongly disagree  Strongly agree

8. **Cash versus Debt:** you have adequate liquid investments for emergencies.

Strongly disagree  Strongly agree

9. **Investments:** you have quality, diversified investments that you understand and that support your goals.

Strongly disagree  Strongly agree

10. **Foundation basics:** your will & legal documents are current and have adequate insurances to protect your family.

Strongly disagree  Strongly agree

11. **Business Strategy:** is clear & focuses your people on providing measurable value to your ideal customers.

Strongly disagree  Strongly agree

12. **Management Team:** knows your goals and values, and can make decisions and run the business without you.

Strongly disagree  Strongly agree

13. **Valuation:** you know what your company is worth and how to maximize its valuation on an ongoing basis.

Strongly disagree  Strongly agree

14. **Metrics:** you know and receive key operational, financial and qualitative information quickly and accurately.

Strongly disagree  Strongly agree

15. **Growth:** you have adequate resources, plans and the right people to consistently grow significantly in the future.

Strongly disagree  Strongly agree

16. **Talent:** your people have career plans, are empowered, engaged, and recognized and rewarded for results.

Strongly disagree  Strongly agree

17. **Suppliers:** you receive quality support at reasonable prices and can scale capacity through outsourcing or partners.

Strongly disagree  Strongly agree

18. **Financial:** working capital is in-place with access to foreseeable financial needs.

Strongly disagree  Strongly agree

19. **Exit and Risks:** you have a clear exit or transition strategy with a back-up risk management plan in place.

Strongly disagree  Strongly agree

20. **Legacy:** you feel confident about your ability to attain a legacy you will be proud of.

Strongly disagree  Strongly agree

ACTION PLAN

What are your top three priorities?

- _____
- _____
- _____

Who can help you?

- _____
- _____
- _____

When to start?

- _____
- _____
- _____