

The Business Blueprint Report Card

Submit To:

Client Name(s):

Telephone:

E-mail Address:

To help you clearly understand your current situation, try The Business Blueprint Report Card.

Rate your reactions to each pair of phrases. Decide where you lie on the scale (1-10). Your responses will be totalled and rated with our financial report card.

We have no structured agreement or funding in place in the event of death of an owner(s).		We have a structured agreement or funding in place in the event of death of an owner(s).
We have no exit or transition plan in place for the owner(s) upon retirement.		We have an exit or transition plan in place for the owner(s) upon retirement.
We do not currently receive superior service and advice from our employee benefits consultant.		We do receive superior service and advice from our employee benefits consultant.
We do not know if our employee benefits plan is priced competitively with the market.		We know that our employee benefits plan is priced competitively with the market.
The business would suffer greatly in the event of death or disability to a key person or owner.		The business would not suffer greatly in the event of death or disability to a key person or owner.
We do not have a group retirement plan in place for our employees.		We do have a group retirement plan in place for our employees.
We do not offer any assistance to our employees with regards to retirement planning or counseling.		We do offer assistance to our employees with regards to retirement planning or counseling.
The owner(s) and senior management do not have a sound strategy corporately assisted.		The owner(s) and senior management do have a sound wealth management strategy corporately assisted.