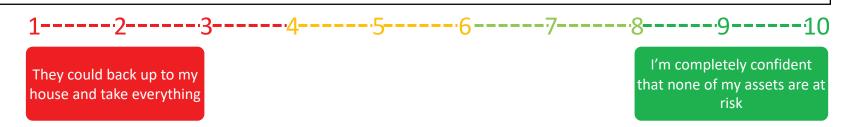
How many of your assets are at risk if you get sued?



When you're no longer able to drive your own wealth decisions, how confident are you that you have passed on those responsibilities in a way that makes a positive difference for those you love and the causes you care about?



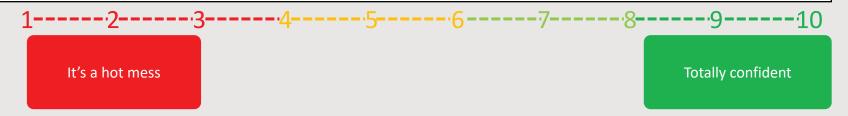
To what extent do you have a "shield" in place that removes shiny objects, salespeople, pitches, professionals seeking information, and other distractions from interfering with the activities that need your attention most?



How clear are you about the realizable value of your business right now if you had to sell it?



How confident are you that you could completely forget about your wealth management and still know for sure that your wealth team is proactively driving your wealth forward?



To what extent do you feel like you have an advisor in your corner who "gets you" and "gets it" and has a legal and ethical requirement to put you and your family first?



How convinced are you that your annual plan for paying less tax is delivering on all the legal opportunities available to you?



How significant and well-managed is the portfolio of assets outside of your company?



Do you have a proven way to monitor and improve the critical drivers to increase your business profits?

It's time to add up your scores in each of the 3 sections.

For example a perfect score would be a 30/30 in each section ("Protect" Q1-Q3, "Manage" Q4-Q7, and "Grow" Q8-Q10) for a total of 90/90.

*IMPORTANT:* If you score below a 50 overall (red or yellow) contact your advisor to discuss the gaps in your plan. You can also schedule stress test with me at <u>calendly.com/jim\_dwm/45min-zoom-strategy-session-with-jim</u> to discuss your results.

Most entrepreneurs I know score below 60 when we first meet, so don't feel bad if your score is lower than you'd hoped.

My "Protect Score" is \_\_\_\_/30

My "Manage Score" is \_\_\_\_/30

My "Grow Score" is \_\_\_\_/30

Total Score \_\_\_\_/90

0-25 26-50 51-75

76-90

This scorecard is for general education and shouldn't be used to make specific decisions about your wealth management. This scorecard and any subsequent strategy call or educational information is provided for free with no commitment or obligation to hire Dew Wealth. Any discussion about working with Dew Wealth would be subject to discussions and disclosure of possible services and corresponding fees as appropriate.