

Make Rich Real[®] Scorecard

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

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

They could back up to my house and take everything

I'm completely confident that none of my assets are at risk

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?

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

The courts will figure it all out

My plan is rock solid

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?

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

I have a decent assistant

My shield saves me countless hours and tons of energy

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

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

I'm not even sure it's sellable

Down to the penny and who the likely buyer will be

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?

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

It's a hot mess

Totally confident

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?

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

With the advisor I've got, who needs enemies?

They have me and my family's back completely

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

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

Every year the US Treasury sends me a birthday card

My plan is second to none

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

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

Does my new car count?

I have absolute certainty that my portfolio is significant & well-managed

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

1-----2-----3-----4-----5-----6-----7-----8-----9-----10

I check my bank account once-in-a-while

I'm totally on top of my profit driver metrics

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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 calendly.com/jim_dwm/45min-zoom-strategy-session-with-jim 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

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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.