

BUSINESS VALUE PROTECTION PLANNING™ SELF-ASSESSMENT TOOL

NAME

COMPANY

BRIEF PRODUCT/SERVICE DESCRIPTION

This BVPP™ self-assessment tool allows you to identify, assess, and understand how much the value of your company may be at risk if you are suddenly not in control. It also helps you evaluate how well equipped you feel you are for mitigating those risks.

DETERMINING IF YOUR BUSINESS WEALTH MAY BE AT RISK

QUESTION	RESPONSE
Do you know the value of your company?	<input type="checkbox"/> YES \$ _____ <input type="checkbox"/> NO HOW DETERMINED: _____
Do you update the valuation of your company at least annually?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Does your interest in the business represent 50% or more of your total net worth?	<input type="checkbox"/> YES <input type="checkbox"/> NO
If you were to die, become substantially disabled, divorced, lose a business partner or key employee how much would the value of your business change?	\$ or % _____ WHY?
Do you periodically review your strategic, legal, and financial plans that protect your business wealth?	<input type="checkbox"/> YES NOTES: <input type="checkbox"/> NO
Do you legal, accounting, financial and risk management advisors work with you as a coordinated team?	<input type="checkbox"/> YES NOTES: <input type="checkbox"/> NO

Please assess your ability to comprehensively address the following risks:

RISK SELF-ASSESSMENT AREAS	Strongly Agree	Somewhat Disagree	Do Not Agree	NOTES
I possess the tools and abilities to successfully address and mitigate risks to my business wealth and income.				
I am able to direct the work of my professional advisory team to provide what I need to protect wealth and income				
I am open to having a planning coordinator direct my advisory team				
My estate plan is current and regularly reviewed and updated				
I have a Buy-Sell Agreement or buy-out provisions in my operating agreement				
I have a written succession plan				
I know when and how I want to exit the business				
I have identified either family members and/or key employees to be part of my succession plan				
I have plans in place to retain, reward and/or recruit key talent to the company				
I find it hard to dedicate the time and resources needed to be sure my planning is current, complete and coordinate.				

Please provide us with any additional thoughts or details related to your assessment of your ability to keep plans in place that protect your business wealth and income.