



The Succession Scorecard

To help you clearly understand your current situation, try *The Succession Scorecard*. Rate your reactions to each pair of phrases. Decide where you lie on the scale from 1 to 10. Add up your total from each column.

Speak to one of our advisors to understand the significance of your score.

We don't have a clear vision for the future of our family business after I am gone	1	2	3	4	5	6	7	8	9	10	We have a clear vision for the future of our family business after I am gone
We do not have a plan to perpetuate the family business after I am gone	1	2	3	4	5	6	7	8	9	10	We have a plan to perpetuate the family business after I am gone
We have not communicated our desired plan to our family	1	2	3	4	5	6	7	8	9	10	We have communicated our desired plan to our family
Our family has not participated together in the planning process	1	2	3	4	5	6	7	8	9	10	Our family has participated together in the planning process
There is no accord or agreement in the family regarding values, principles, shared vision, and implementation steps	1	2	3	4	5	6	7	8	9	10	There is accord and agreement in the family regarding values, principles, shared vision, and implementation steps
We are procrastinating about dealing with our succession issues	1	2	3	4	5	6	7	8	9	10	We are dealing directly with our succession issues and getting them dealt with properly
I do not have a plan to protect the value of my private company shares	1	2	3	4	5	6	7	8	9	10	I have a plan to protect the value of my private company shares
My key financial advisors are not working together	1	2	3	4	5	6	7	8	9	10	My key financial advisors are working together
My legal agreement and financial affairs are not completed and up-to-date	1	2	3	4	5	6	7	8	9	10	My legal agreement and financial affairs are completed and up-to-date
I do not know how I am going to get my succession and estate planning done and implemented	1	2	3	4	5	6	7	8	9	10	I have process and toolkit to get my succession and estate planning done and implemented

Your Succession Scorecard Total: