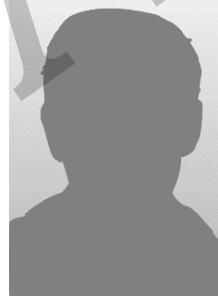




Implement and Monitor Plan Client Timeline

Life plan for your business

Prepared for: Sample Client



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SAMPLE

Project Your Goals | 75% Completed

SAMPLE CLIENT

ALL TASKS

75

PERCENT

OVERDUE	0
COMPLETED	4
<u>REMAINING TASKS DUE IN:</u>	
7 DAYS	2
30 DAYS	2
90 DAYS	2
ALL TASKS	2

Notes

SAMPLE

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/1/16	First meeting - introduction	Completed	EP
4/10/16	Discussion on goals - Scorecard	Completed	EP
4/13/16	Follow up call	Completed	EP
4/21/16	Discuss buy/sell agreement – Protection Road Map	Completed	EP
5/10/16	Collect information and facts – Life plan inventory	In Progress	EP
5/14/16	Follow up call	Not Started	EP

Needs Analysis | 50% Completed

SAMPLE CLIENT

ALL TASKS
50
PERCENT

OVERDUE 0

COMPLETED 0

REMAINING TASKS DUE IN:

7 DAYS 3

30 DAYS 4

90 DAYS 4

ALL TASKS 4

Notes

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
5/10/16	Finish collecting necessary information	In Progress	EP
5/12/16	Prepare conversion of value analysis	Not Started	EP
5/14/16	Follow up call	Not Started	EP
5/25/16	Present conversion of value analysis	Not Started	EP

Value Your Business | 10% Completed

SAMPLE CLIENT

ALL TASKS

10

PERCENT

OVERDUE	0
COMPLETED	2
<u>REMAINING TASKS DUE IN:</u>	
7 DAYS	1
30 DAYS	3
90 DAYS	7
ALL TASKS	8

Notes

SAMPLE

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/21/16	Discuss need for a business valuation	Completed	EP
5/8/16	Estimation of value prepared	Completed	EP
5/14/16	Follow up call – discuss marketability assessment	Not Started	EP
5/25/16	Present estimation of value	Not Started	EP
6/2/16	Fill out marketability assessment tool	Not Started	EP
6/28/16	Present marketability assessment	Not Started	EP
7/8/16	Discuss valuation issues	Not Started	EP
7/14/16	Follow up call	Not Started	EP
7/18/16	Submit for a full business valuation	Not Started	EP
8/21/16	Review the full business valuation	Not Started	EP

Define Marketability Strategy | 0% Completed

SAMPLE CLIENT

ALL TASKS

0

PERCENT

- OVERDUE 1
- COMPLETED 0
- REMAINING TASKS DUE IN:
- 7 DAYS 2
- 30 DAYS 3
- 90 DAYS 4
- ALL TASKS 5

Notes

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
5/6/16	Pull information on deferred compensation	Overdue	EP
5/14/16	Discuss selling to a third party	Not Started	EP
5/25/16	Present information on deferred compensation	Not Started	EP
7/18/16	Introduction to mergers and acquisition advisor	Not Started	EP
8/21/16	Follow up call	Not Started	EP

Design Optimal Solutions | 25% Completed

SAMPLE CLIENT

ALL TASKS

25

PERCENT

OVERDUE	0
COMPLETED	2
<u>REMAINING TASKS DUE IN:</u>	
7 DAYS	1
30 DAYS	3
90 DAYS	6
ALL TASKS	6

Notes

SAMPLE

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/13/16	Discuss exit options	Completed	EP
4/21/16	Present family and co-owner exit options	Completed	EP
5/14/16	Follow up call – discuss other exit options	Not Started	EP
5/20/16	Pull information on employee exit options	Not Started	EP
5/25/16	Present information on employee exit options	Not Started	EP
6/12/16	Pull information on selling to a third party	Not Started	EP
6/28/16	Present information on selling to a third party	Not Started	EP
8/1/16	Targeted business planning case	Not Started	EP

Implement and Monitor Plan | 20% Completed

SAMPLE CLIENT

ALL TASKS

20

PERCENT

OVERDUE	0
COMPLETED	1
<u>REMAINING TASKS DUE IN:</u>	
7 DAYS	0
30 DAYS	1
90 DAYS	1
ALL TASKS	2

Notes

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/10/16	Set up Implement and Monitor	Completed	EP
6/28/16	Review the Life plan	Not Started	EP
9/30/16	Quarterly review of the Life plan	Not Started	EP

