



The Business Owner Checkup™ Provided By

To help you clearly understand your current situation, try *The Business Owner Checkup™*. Rate your reactions to each pair of phrases. Decide where you lie on the scale from 1 to 5. Add up your total from each column.

We will further discuss the scorecard in a complimentary Strategic Legal Audit™.

	1	2	3	4	5	
I feel I am spending too much money in legal fees.						I feel like I am in control of my legal fees and receive value for my expense.
I am unsure if I have kept up formal recordkeeping and formalities necessary to keep my corporate shield in place.						I am confident I have kept up formal recordkeeping and formalities necessary to keep my corporate shield in place.
I am not sure if I would be protected if I were sued.						I am confident I would be protected if I were sued
I am not sure if my company setup takes advantage of all tax benefits available.						I am confident my corporate setup takes advantage of all tax benefits available.
I am unsure if I have a plan to keep and groom my best employees.						I have completed planning to keep and groom my best employees.
I am worried that if my employees quit, they might steal my customers and my ideas.						I am confident I am protected so that my employees cannot steal my customers or my ideas.
I am not sure what will happen to my company if I become disabled or died.						I (and my partners) have completed planning in the event I become disabled or died.
My family is not prepared to handle my business if I die.						My family is well-educated and informed to settle matters relating to my business if I die.
I do not have a plan to grow my business – or my plan is not strategically mapped out.						I have a written Strategic Roadmap™ with action steps to grow my business.
I have not completed my own estate planning.						I have completed my estate planning, coordinated my assets with my plan and have a plan to keep it updated with legal changes.
ADD COLUMN TOTALS						YOUR SCORE _____

If you wish to discuss your answers further, please contact us to schedule a Strategic Legal Audit™. Based on our relationship with (Insert CPA Name), this meeting is complimentary. During your Strategic Legal Audit™ you will:

- Complete a legal risks assessment to determine any dangers facing your business
- Determine immediate legal needs and budget
- Evaluate ways to leverage legal resources
- Educate us about your business
- Complete an Annual Corporate Protection Maximizer™ to ensure your corporation is being used to protect your personal assets
- Discuss different options of working with our firm so you can select which way best supports your company's needs

Please remember I am not a lawyer; nor is this intended to be interpreted as legal, financial, or tax advice. I am not paid or compensated in any way by this law firm. In addition, I am not responsible for your failure to follow through on seeking professional advice.

The Strategic Counsel, L.C.

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