



For Families and Legacy Planning: The Vision Advocate Scorecard™

The Vision Advocate Scorecard™ helps you clearly understand your current situation. Rate your reaction to each pair of phrases on a scale from 1 to 10. A 1 means the phrase on the left is a better description of your situation; 10 indicates that the right hand phrase is better. Add up the total in each column and discuss with your advisor.

| | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | |
|---|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--|
| 1 | We do not have a written vision statement for our future | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We have a clear and written future vision statement |
| 2 | We don't have an action plan to achieve our goals, both personal and financial | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We have an action plan to achieve our goals, both personal and financial |
| 3 | Our investments are scattered and uncoordinated | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Our investments are coordinated and organized |
| 4 | We do not have a written estate plan | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We have a written estate and legacy plan |
| 5 | We have not identified the risks and opportunities to achieve our plan | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We have identified the risks and opportunities to achieve our plan |
| 6 | We do not review our vision, plan or progress on a regular basis | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We review our vision, plan and progress on a regular basis |
| 7 | Our financial advisors do not communicate with each other for optimal synergy | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Our financial advisors communicate with each other and work as a team |
| 8 | We have not reviewed many of the tools to help us achieve our vision | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We have reviewed the tools to help us achieve our vision |
| 9 | We do not have a plan to use our wealth to perpetuate our values | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We have a plan to use our wealth to perpetuate our values |
| 10 | We do not have as much confidence in the future as we would like | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | We have a high level of confidence in our future |
| | | | | | | | | | | | | |
| <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="background-color: #0056b3; color: white; padding: 5px 10px; border-radius: 5px;">ADD COLUMN TOTALS</div> <div style="border: 1px solid black; width: 40px; height: 30px; display: flex; align-items: center; justify-content: center;"> <div style="background-color: #0056b3; color: white; padding: 5px 10px; border-radius: 5px;">YOUR SCORE</div> </div> </div> | | | | | | | | | | | | |



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