LifePlan
For your business®



IMPLEMENT AND MONITOR PLAN

Client Timeline

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Project Your Goals | 75% Completed 2

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Sample

Project Your Goals | 75% Completed

OVERDUE	0
COMPLETED	3
REMAINING TASKS DUE IN:	
7 DAYS	0
30 DAYS	1
90 DAYS	1
ALL TASKS	1

Notes

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/1/24	First meeting - introduction	Completed	Member
4/1/24	Discussion on goals - Scorecard	Completed	Member, Client
4/14/24	Collect information and facts – Life Plan Strategies for Your Business Inventory	Completed	Member
5/1/24	Follow up call to discuss next steps	Not Started	Member, TNG

Sample

Needs Analysis | 50% Completed

OVERDUE	0
COMPLETED	2
REMAINING TASKS DUE IN:	
7 DAYS	0
30 DAYS	2
90 DAYS	2
ALL TASKS	2

Notes

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/12/24	Finish collecting necessary information	Completed	Member
4/14/24	Input information for conversion of value	Completed	Member
4/24/24	Present conversion of value analysis	Not Started	Member
5/2/24	Discuss next steps in the process	Not Started	Member, TNG

Sample

Value Your Business | 25% Completed

OVERDUE	0
COMPLETED	2
REMAINING TASKS DUE IN:	
7 DAYS	0
30 DAYS	3
90 DAYS	5
ALL TASKS	6

Notes

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/1/24	Discuss need for a business valuation	Completed	Member
4/14/24	Estimation of value prepared	Completed	TNG
5/2/24	Follow up call – discuss marketability assessment	Not Started	Member
5/4/24	Present estimation of value	Not Started	TNG, Member
5/12/24	Fill out marketability assessment tool	Not Started	Member, Client
6/2/24	Present marketability assessment	Not Started	TNG, Member
7/14/24	Submit for a full business valuation	Not Started	Member, Client
8/21/24	Present the full business valuation	Not Started	Adams, TNG, Member

Sample

Define Marketability Strategy | 20% Completed

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

Notes

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/6/24	Discuss key employees with client	Completed	Member
4/21/24	Present information on deferred compensation	Not Started	Member
4/21/24	Discuss mergers and acquisition resource	Not Started	Member
7/1/24	Introduction to mergers and acquisition advisor	Not Started	Member, TNG
7/14/24	Call with mergers and acquisition advisor	Not Started	SM2, Member, TNG

Sample

Design Optimal Solutions | 40% Completed

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

Notes

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/13/24	Discuss exit options with The Nautilus Group	Completed	Member
4/14/24	Review the exit options that were discussed	Completed	Member
4/24/24	Present three exit options to the client	Not Started	Member
5/2/24	Open a targeted business planning case	Not Started	Member
5/25/24	Present customized targeted business succession plan to client	Not Started	Member, TNG

Sample

Implement and Monitor Plan | 33% Completed

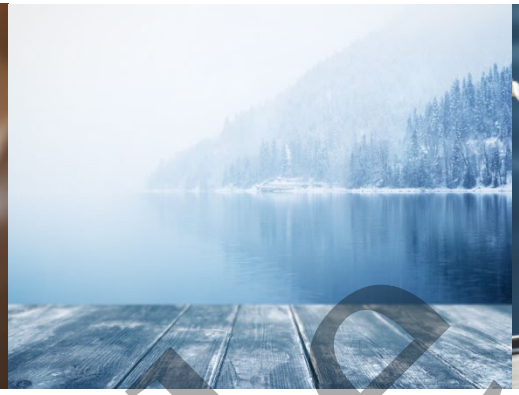
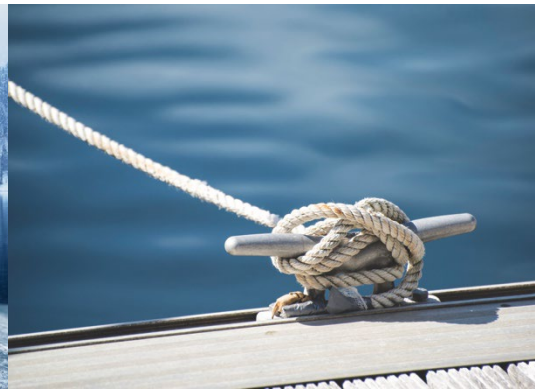
OVERDUE	0
COMPLETED	1
REMAINING TASKS DUE IN:	
7 DAYS	0
30 DAYS	0
90 DAYS	1
ALL TASKS	2

Notes

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/10/24	Set up Implement and Monitor	Completed	Member
6/28/24	Review the Life Plan Strategies for Your Business with client	Not Started	Member, Client
9/30/24	Quarterly review of the Life Plan Strategies for Your Business	Not Started	Member, Client

Sample



Notes

Sample

Your follow-up appointment is scheduled for:

Date: _____ Time: _____