

IMPLEMENT AND MONITOR PLAN

Client Timeline



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Sample

Project Your Goals | 75% Completed

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

Notes

| TARGET DATE | TASK | STATUS | RESPONSIBLE PARTY |
|-------------|---|-------------|-------------------|
| 4/1/17 | First meeting - introduction | Completed | Member |
| 4/1/17 | Discussion on goals - Scorecard | Completed | Member, Client |
| 4/14/17 | Collect information and facts - Life plan inventory | Completed | Member |
| 5/1/17 | Follow up call to discuss next steps | Not Started | Member, TNG |

Needs Analysis | 50% Completed

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

| TARGET DATE | TASK | STATUS | RESPONSIBLE PARTY |
|-------------|---|-------------|-------------------|
| 4/12/17 | Finish collecting necessary information | Completed | Member |
| 4/14/17 | Input information for Conversion of Value | Completed | Member |
| 4/24/17 | Present conversion of value analysis | Not Started | Member |
| 5/2/17 | Discuss next steps in the process | Not Started | Member, TNG |

Value Your Business | 25% Completed

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|--------------------------------|---|
| OVERDUE | 0 |
| COMPLETED | 2 |
| <u>REMAINING TASKS DUE IN:</u> | |
| 7 DAYS | 0 |
| 30 DAYS | 3 |
| 90 DAYS | 5 |
| ALL TASKS | 6 |

Notes

| TARGET DATE | TASK | STATUS | RESPONSIBLE PARTY |
|-------------|---|-------------|--------------------|
| 4/1/17 | Discuss need for a business valuation | Completed | Member |
| 4/14/17 | Estimation of value prepared | Completed | TNG |
| 5/2/17 | Follow up call – discuss marketability assessment | Not Started | Member |
| 5/4/17 | Present estimation of value | Not Started | TNG, Member |
| 5/12/17 | Fill out marketability assessment tool | Not Started | Member, Client |
| 6/2/17 | Present marketability assessment | Not Started | TNG, Member |
| 7/14/17 | Submit for a full business valuation | Not Started | Member, Client |
| 8/21/17 | Present the full business valuation | Not Started | Adams, TNG, Member |

Define Marketability Strategy | 20% Completed

| | | |
|--------------------------------|---|-------|
| OVERDUE | 0 | Notes |
| COMPLETED | 1 | |
| <u>REMAINING TASKS DUE IN:</u> | | |
| 7 DAYS | 2 | |
| 30 DAYS | 2 | |
| 90 DAYS | 4 | |
| ALL TASKS | 4 | |

| TARGET DATE | TASK | STATUS | RESPONSIBLE PARTY |
|-------------|---|-------------|-------------------|
| 4/6/17 | Discuss key employees with client | Completed | Member |
| 4/21/17 | Present information on deferred compensation | Not Started | Member |
| 4/21/17 | Discuss mergers and acquisition resource | Not Started | Member |
| 7/1/17 | Introduction to mergers and acquisition advisor | Not Started | Member, TNG |
| 7/14/17 | Call with mergers and acquisition advisor | Not Started | SM2, Member, TNG |

Design Optimal Solutions | 40% Completed

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

| |
|-------|
| Notes |
|-------|

| TARGET DATE | TASK | STATUS | RESPONSIBLE PARTY |
|-------------|--|-------------|-------------------|
| 4/13/17 | Discuss exit options with The Nautilus Group | Completed | Member |
| 4/14/17 | Review the exit options that were discussed | Completed | Member |
| 4/24/17 | Present three exit options to the client | Not Started | Member |
| 5/2/17 | Open a targeted business planning case | Not Started | Member |
| 5/25/17 | Present customized targeted business succession plan to client | Not Started | Member, TNG |

Implement and Monitor Plan | 33% Completed

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

Notes

| TARGET DATE | TASK | STATUS | RESPONSIBLE PARTY |
|-------------|-----------------------------------|-------------|-------------------|
| 4/10/17 | Set up Implement and Monitor | Completed | Member |
| 6/28/17 | Review the Life plan with client | Not Started | Member, Client |
| 9/30/17 | Quarterly review of the Life plan | Not Started | Member, Client |

