



## Personal Vision Guide

Defining your Personal Vision (PV) is one of the most important things you can do for yourself and your business. It is a 5 to 10 year plan that identifies what you want your business to do for you.

Owner: \_\_\_\_\_

Company: \_\_\_\_\_

Date: \_\_\_\_\_

As an owner, you run a company for your own benefit. You assume the risks, and put in the effort, with an expectation of results. Clearly defining that objective helps keep your focus and balance.

Although developing a Personal Vision can be done as an independent exercise by any business owner, we recommend utilizing this worksheet and working with a trusted advisor who can help you identify your goals.

Note: After completing the worksheet, you will be able to draft the final version of your Personal Vision which you should limit to 100 words. You'll find that the discipline of making it short will help identify those things which are most important.

### To start, please answer the following questions:

1. When would you like to be free of day-to-day responsibilities? (# of years) \_\_\_\_\_
2. When will you leave your business entirely? (# of years) \_\_\_\_\_
3. **IF** funding for your retirement requires selling the company (either internally or externally), when do you expect to receive the proceeds? (date) \_\_\_\_\_
4. **What do you think the value of your company is now?** \_\_\_\_\_
5. What do you think the pre-tax proceeds from your company will be at the time of a transfer/sale?  
\_\_\_\_\_

Use the ExitMap® Triangulation© Tool to model time, savings and distance-to-goal scenarios.

### PART 1: Personal Objectives

6. If your company was running "right," what would your job look like?

Days and hours you would work: \_\_\_\_\_

A typical day's activities: \_\_\_\_\_

How much vacation would you take (no contact with business)? \_\_\_\_\_

7. What material assets do you desire? (home, vacation home, cars, boats, etc.)

List them and your estimate of the cost for each:

Asset:	Cost of Asset:
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____



This sample is provided for demonstration purposes only.

Some pages have been excluded in order to protect our intellectual property.