

Tax Preparation  
Financial Planning  
Business Personal  
Accounting  
Quickbooks™  
Setup & Training  
Consulting

# VISION PLANNING

**TAKING THE BEST CARE OF YOU  
AND YOUR BUSINESS**



Presented by

ACCOUNTING  
RESOURCE  
GROUP INC

TAKING CARE OF BUSINESS

# DO YOU HAVE A VISION?



**What excites and inspires you?**

**Is running your business as exciting now as it once was?**

**Where is your business in the business cycle?  
(emerging, growing, mature)**

**Do you know the value of your business?  
(monetary, intrinsic)**

**Are you working more “in your business” or “on your business”?**

**If you had no fear, what would you create?**

**How will you recognize when you’ve achieved your goals...  
arrived at your destination?**

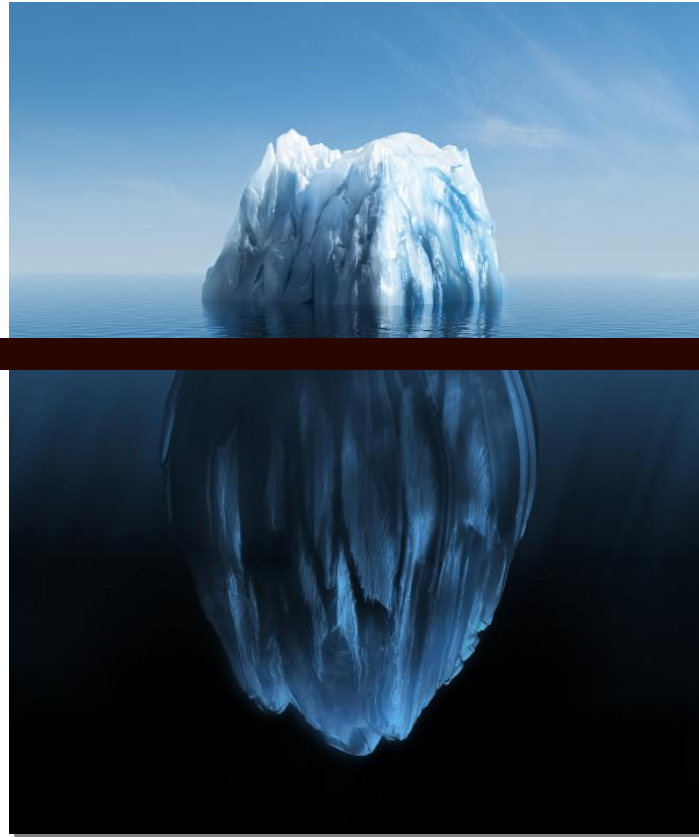


**OUR OBJECTIVE:**

**BRING CLARITY TO YOUR VISION  
IN ORDER TO MAKE WISE DECISIONS.**

**HELP YOU ACHIEVE YOUR GOALS  
CALMLY AND WITH CONFIDENCE.**

# WHAT WE SEE



# WHAT IS TO BE SEEN

# HOW?

# MISSION, VISION, VALUES & GOALS

**1.**  
**Discovery**  
**CLARITY**

**2.**  
**Assessment**  
**KNOWLEDGE**

**5.**  
**Management**  
**CONFIDENCE**

**3.**  
**Decisions**  
**SOLUTIONS**

**4.**  
**Implementation**  
**RESULTS**

# STRATEGIES, TACTICS & TOOLS

# YOUR DISCOVERY

## Profile

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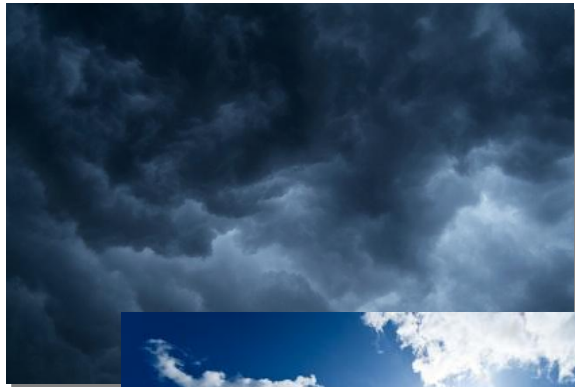
Vision

Importance

Supporting Resources

Obstacles

Readiness



# YOUR DISCOVERY

## Affirmation

**THE VISION PROFILE™**

Client Name(s) \_\_\_\_\_ Date \_\_\_\_\_

Timeframe \_\_\_\_\_ Category \_\_\_\_\_

1 \_\_\_\_\_  
2 \_\_\_\_\_  
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30 \_\_\_\_\_

Top Five  
1  
2  
3  
4  
5

**THE VISOR WORKSHEET™**

Client Name(s) \_\_\_\_\_ Date \_\_\_\_\_

Goal Category: \_\_\_\_\_

Goal: \_\_\_\_\_

Importance: \_\_\_\_\_

Obstacles: \_\_\_\_\_

**VISION AFFIRMATIONS FOR MICHAEL AND JOAN WILLIAMS**  
PREPARED BY SCOTT JEFFERSON OF JEFFERSON CAPITAL, LLC  
MONDAY, FEBRUARY 01, 2010

The VISOR Affirmation Report is designed to effectively highlight how you feel about a number of key planning issues. This knowledge offers a unique opportunity to shape your financial objectives around your goals, while at the same time highlighting your greatest priorities. This report will ultimately serve as a guide for future planning decisions.

Below please find your responses to the goals you would like to accomplish, the importance of accomplishing the goal, the supporting resources available to support the goal, the obstacles to be considered and lastly the level of readiness to take action on this goal immediately.

I have identified 7 responses from our meetings. I have organized these responses into 7 categories. Please carefully review each of the areas below and mark an 'A' if you agree with the response or 'D' if you disagree. If you disagree, please identify how you would wish to change this statement. Please add comments and additional statements in the space provided and please initial the report.

**Investment Planning** A/D  
**Vision Profile Goal:**   
We would like to know if our current investments are appropriate to support our lifestyle and protects us from future downturns in the market.

**Importance:**   
We would like to have the confidence that we have the appropriate resources to keep our current lifestyle and have a secure future.

**Supporting Resources:**   
The ability for the business to maintain revenue and valuation for the next 10 years. Investment portfolios, retirement accounts and pension.

**Obstacles:**   
Downturns in the market, unforeseen circumstances that would require more spending and new business competition.

**Readiness:**  1 2 3 4 5 (1 = Ready, 5 = Not Ready)

Comment: \_\_\_\_\_

Michael and Joan Williams (Initials) \_\_\_\_\_ Date \_\_\_\_\_  
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## THE VISOR AFFIRMATION

Before we discuss any potential recommendation, the affirmation process ensures we are on the same page and that your vision and goals have been documented.

# YOUR DISCOVERY

## Team Profile

*Discovering the professional landscape.*

**TEAM PROFILE™**

Client Name(s) \_\_\_\_\_ Date \_\_\_\_\_

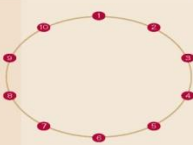
Rate each advisor on a scale of -3, -2, -1, 0, 1, 2, 3, where -3 indicates the advisor is a team liability in the respective category and 3 indicates the advisor is a team asset:

R Relationship: How well has this advisor maintained your relationship?  
D Discovery: How effective are they at helping you achieve clarity before making a choice?  
S Solution: How effective are they at introducing solutions you have implemented?  
M Management: How effective are they at managing projects they initiate to a timely conclusion?


Rate each advisor on a scale of 1 to 10, with 10 representing a high score:

C Credibility: What is this advisor's level of professional credibility? (10 indicates high credibility)  
R Reliability: How reliable is this advisor? (10 indicates high reliability)  
I Intimacy: How comfortable are you talking with this advisor regarding private or personal matters? (10 indicates high intimacy)  
O Orientation: What is your level of concern that the advisor places his or her interests ahead of your own? (10 indicates high self interest)

Advisor Name	What do they do?	R	D	S	M	C	R	I	O
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									



If you could choose only one, which advisor are you most likely to call if faced with a challenging issue? \_\_\_\_\_



- Names of advisors
- Define what they do
- Measure the depth of the relationship
- Discover the relationships between them

# YOUR DISCOVERY

## Business Questionnaire

*Discovering values, desires and each owner's preference related to the following:*

- Business Financials
- Ownership & Control
- Ownership Transition
- Leadership
- Management
- Governance
- Contingency Planning
- Financial Independence
- Life After Work



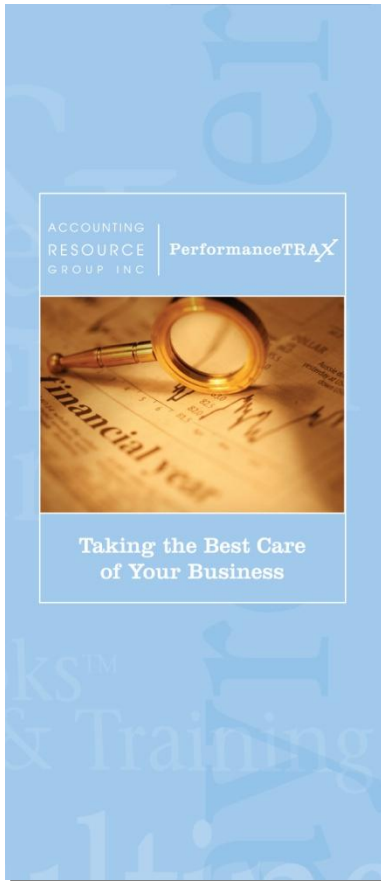
# YOUR ASSESSMENT

## Business Analysis with

PerformanceTRAX

*PerformanceTrax provides:*

- Performance Analysis for your business
- Performance Trends and Ratios based on Comparative Industry Data
- Cash Flow and Budgeting Forecasts (Projections)



# WHY DO WE DO THIS WORK?



To get at the heart of your goals and dreams.

**Clarity is achievable.**



**Results are the deliverable!**

**Clarity is achievable.**



**Results are the deliverable!**

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# VISION PLANNING

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