

LIFT MY BUSINESS CONFIDENCE ASSESSMENT

Assessment Overview

This assessment has been designed to provide real optics into where you should feel confidence and where you need additional development and support in your business foundation.

As you go through line-by-line, we ask that you consider the Confidence you feel with the **systems you already have in place.**

Please use the key for support as you rate each area, as well as total up each section & your overall score. If you are unclear about the content of a row, go ahead & give yourself a low score & make a note for yourself in the section provided.

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|---|
| 0 = unaware - no understanding - no confidence |
| 1 = minimal understanding - haphazard approach - low confidence |
| 2 = some understanding - minimal systems in place - some confidence |
| 3 = understanding - some systems in place - fair confidence |
| 4 = understanding - most systems in place - confident |
| 5 = strong understanding - all systems in place - very confident |

Name:

LEGAL	0 - 5	NOTES
Incorporated & Maintaining Entity		
Written Agreements in Place		
Legally Compliant Team Structure		
Protected Intellectual Property		
Protected for Incapacity or Death		

Legal Total of 25

INSURANCE	0 - 5	NOTES
Proper Home/ Auto Coverage		
Proper Health Coverage		
Proper Business Coverage		
Proper Life Coverage		
Community/ Network Support		

Insurance Total of 25

FINANCIAL	0 - 5	NOTES
Money Map Numbers		
Historic - Expense Tracking		
Future - Financial Modeling		
Weekly Review of Reports		
Monthly & Quarterly Analysis		

Financial Total of 25

TAX	0 - 5	NOTES
Current on Tax Filings		
Clarity on Tax Filings		
Proper Savings to Pay Taxes		
Current on Paying Taxes		
Strategy to Minimize Taxes		

Tax Total of 25

LIFT My Business Confidence Score of 100

If your "LIFT My Business Confidence Score" is less than 85, you may want to schedule a LIFT Your Life and Business Planning Session with a Creative Business Lawyer®, as soon as possible, so you can get on the path of building your life and business awake, aware and on your terms.

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