



The Strategic Blueprint Scorecard™

**charles
stephen**
Financial Architects

Instant Insight: The Strategic Blueprint Scorecard™

The Strategic Blueprint Scorecard™ will help you understand your perception of your current financial position.

You don't have to break out financial records or do complex calculations. Just check your reactions to each pair of sentences. Let your response be intuitive. Mark it on the scale from 1 to 10. Add up your total from each column. Speak to a Charles Stephen advisor to understand your score.

	1	2	3	4	5	6	7	8	9	10	
We don't have clear financial goals or a strategy to meet them											We have very clear financial goals and a strategy to meet them
We don't have a step-by-step blueprint to achieve financial independence											We have a step-by-step blueprint to achieve financial independence
Our investments are scattered and disorganized											Our investments are integrated and organized
We have not reviewed all of the tools which could help us achieve our vision											We have reviewed all of the tools which could help us achieve our vision
We do not review our progress on a regular basis and our investments are under-performing											We review our progress regularly and are able to avoid our investments under-performing
Our financial advisors work in isolation from one another											Our financial advisor work as a team to help us achieve our vision
Our assets are not keeping pace with inflation											Our assets keep pace with inflation
We are not taking advantage of the benefits of tax planning											We take full advantage of all the tax planning benefits
We do not have a plan to maximize our retirement savings											We have a plan to maximize our retirement savings
My assets are too complicated for my family to manage in case of my death											My assets are clearly organized to help my family manage them in the case of my death
We do not have as much confidence in the future as we would like											We have a strong sense of confidence about our future
Add Column Totals											YOUR SCORE _____

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