



STRATEGIC PLANNING

Dear Valued Client,

*Are you looking to increase business and generate more revenue?
Do you want to take your business to the next level?
Do you want to increase cash flow?*

These are questions that are continuously asked by many business owners. Fortunately, many things can be answered and accomplished when you have a good solid plan in place.

As a business owner, strategic planning is a necessary step towards business and financial success. Remember, if you fail to plan, you are planning to fail! And KD is here to help you plan for your future success!

When you book an appointment with KD for Strategic Planning, we help you identify areas in your finances and business that need special attention. Once we have determined your strengths and weaknesses, we will then help you create a plan and course of action that will keep you on the right path to success! We will also provide you with the tools, resources and guidance you need to be able to put your plan into motion to minimize your weaknesses and build on your strengths!

To jump start your strategic planning, you will need to work through the attached questionnaire. This Planning Questionnaire will provide a snapshot of your goals, cash flow, debt and credit, tax, business and wealth. If you would like a digital copy, you can download the form on the KD website or you can also inquire at the reception desk or contact our office by phone or email.

Once you have completed the questionnaire, please book your strategic planning appointment.

Note that we will need all the information on your completed questionnaire as well as other relevant details you may want to provide for us before your appointment to ensure a productive and valuable planning session.

Thank you and we hope to see you soon!

Sincerely,

KD Management



STRATEGIC PLANNING

Note: This questionnaire must be filled out and submitted to KD **Prior** to the Planning Meeting.

Please fill in the boxes with the number that best represents each statement or question, with 5 being that you fully agree and 1 being that you don't agree at all.

NAME:	
Goals	
1. I have Personal goals that are written down.	
2. I have Business goals that are written down.	
3. I know which of my goals are Short Term, Mid Term and Long Term.	
Closed Circle Budget and Cash Flow	
4. I have a Budget or Closed Circle Budget and stay on top of it regularly	
5. Generally, I don't spend above my budgeted amounts even when I make more \$	
6. I manage my cash flow well	
7. I have adequate savings	
Debt and Credit	
8. I know the balances of my debts and keep up with all payments	
9. I know the difference of good debt and bad debt	
10. I have a plan to eliminate my bad debt	
11. I check my credit score at least once per year	
12. I understand the correlation of tax vs. credit	
Tax	
13. I understand the basics of how personal income tax works	
14. I understand approximately how much I need to save for tax in the business	
15. I have a current tax plan	
Business	
16. I understand the structure of ownership of my business(es)	



STRATEGIC PLANNING

17. In My Opinion, my business operates efficiently	
18. My Business is administered well and there is good record and accessible data	
19. I have a business plan and operate by it, updating it with any changes	
20. I love the products/services I sell in my business and am passionate about it	
21. I would like to grow my business	
22. I have good marketing for my business	
23. I manage the finances of my business daily, weekly and monthly	
24. I review the Financial Statements of my business regularly	
Wealth Accumulation	
25. I understand the difference between Wealth, Riches and Money	
26. I have real estate as part of my investments	
27. I have bullion as part of my investments	
28. I have paper investments such as stocks, funds or bonds	
29. I have passive cash flow coming in or being reinvested	
30. I know my personal Net Worth	
Wealth Preservation	
31. I have myself structured well to preserve my assets	
32. I have adequate life insurance coverage	
33. I have a financial plan for retirement	
34. I have a current will and update it as needed	
Education	
35. I invest in myself and my family through financial and/or business education	
36. I have a personal growth plan and follow it	