

IMPLEMENT AND MONITOR PLAN

# Client Timeline

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Sample

## Project Your Goals | 75% Completed

OVERDUE	0
COMPLETED	3
<u>REMAINING TASKS DUE IN:</u>	
7 DAYS	0
30 DAYS	1
90 DAYS	1
ALL TASKS	1

Notes

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/1/23	First meeting - introduction	Completed	Member
4/1/23	Discussion on goals - Scorecard	Completed	Member, Client
4/14/23	Collect information and facts – Life Plan Strategies for Your Business Inventory	Completed	Member
5/1/23	Follow up call to discuss next steps	Not Started	Member, TNG

## Needs Analysis | 50% Completed

OVERDUE	0	Notes
COMPLETED	2	
<u>REMAINING TASKS DUE IN:</u>		
7 DAYS	0	
30 DAYS	2	
90 DAYS	2	
ALL TASKS	2	

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/12/23	Finish collecting necessary information	Completed	Member
4/14/23	Input information for conversion of value	Completed	Member
4/24/23	Present conversion of value analysis	Not Started	Member
5/2/23	Discuss next steps in the process	Not Started	Member, TNG

## Value Your Business | 25% Completed

OVERDUE	0
COMPLETED	2
<u>REMAINING TASKS DUE IN:</u>	
7 DAYS	0
30 DAYS	3
90 DAYS	5
ALL TASKS	6

Notes

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/1/23	Discuss need for a business valuation	Completed	Member
4/14/23	Estimation of value prepared	Completed	TNG
5/2/23	Follow up call – discuss marketability assessment	Not Started	Member
5/4/23	Present estimation of value	Not Started	TNG, Member
5/12/23	Fill out marketability assessment tool	Not Started	Member, Client
6/2/23	Present marketability assessment	Not Started	TNG, Member
7/14/23	Submit for a full business valuation	Not Started	Member, Client
8/21/23	Present the full business valuation	Not Started	Adams, TNG, Member

## Define Marketability Strategy | 20% Completed

OVERDUE	0
COMPLETED	1
<u>REMAINING TASKS DUE IN:</u>	
7 DAYS	2
30 DAYS	2
90 DAYS	4
ALL TASKS	4

Notes

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/6/23	Discuss key employees with client	Completed	Member
4/21/23	Present information on deferred compensation	Not Started	Member
4/21/23	Discuss mergers and acquisition resource	Not Started	Member
7/1/23	Introduction to mergers and acquisition advisor	Not Started	Member, TNG
7/14/23	Call with mergers and acquisition advisor	Not Started	SM2, Member, TNG

## Design Optimal Solutions | 40% Completed

OVERDUE	0
COMPLETED	2
<u>REMAINING TASKS DUE IN:</u>	
7 DAYS	1
30 DAYS	3
90 DAYS	3
ALL TASKS	3

Notes

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/13/23	Discuss exit options with The Nautilus Group	Completed	Member
4/14/23	Review the exit options that were discussed	Completed	Member
4/24/23	Present three exit options to the client	Not Started	Member
5/2/23	Open a targeted business planning case	Not Started	Member
5/25/23	Present customized targeted business succession plan to client	Not Started	Member, TNG

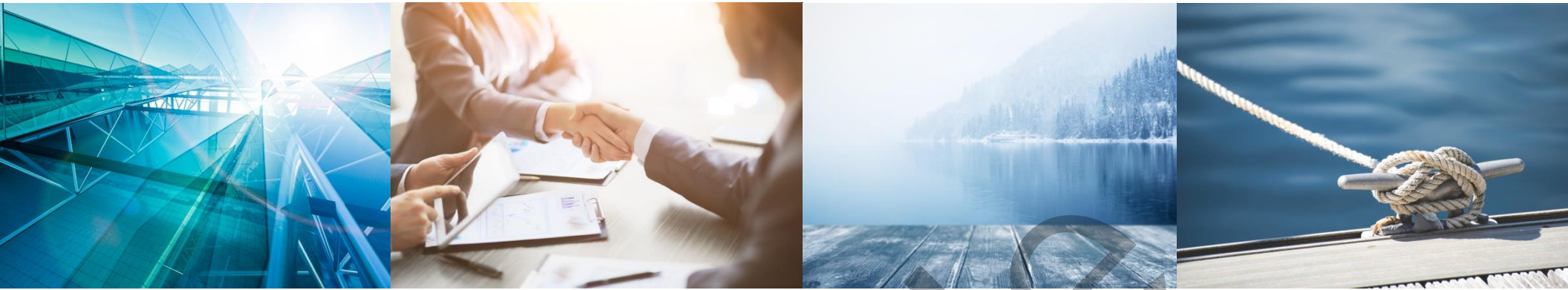
## Implement and Monitor Plan | 33% Completed

OVERDUE	0
COMPLETED	1
<u>REMAINING TASKS DUE IN:</u>	
7 DAYS	0
30 DAYS	0
90 DAYS	1
ALL TASKS	2

Notes

TARGET DATE	TASK	STATUS	RESPONSIBLE PARTY
4/10/23	Set up Implement and Monitor	Completed	Member
6/28/23	Review the Life Plan Strategies for Your Business with client	Not Started	Member, Client
9/30/23	Quarterly review of the Life Plan Strategies for Your Business	Not Started	Member, Client





## Notes

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Your follow-up appointment is scheduled for:

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

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