

# BUSINESS WELLNESS CHECK-IN

If you are growing, are you confident about your hiring process and your ability to retain employees? \_\_\_\_\_

Does your board of advisors have financial literacy (if you have a board at all)? \_\_\_\_\_

Do you believe that your business could be healthier? Are you willing to get some other perspectives? \_\_\_\_\_

Is your business a family business? Are their complexities you'd like to navigate better? \_\_\_\_\_

Does your business serve your lifestyle and values? \_\_\_\_\_

Is there long-term stability in your business? \_\_\_\_\_

Do you have tax, legal, and finance professionals you trust, who are credentialed? \_\_\_\_\_

Do you have someone in your corner that can help you stay honest about achieving your goals? \_\_\_\_\_

Is your business taking over your life and you have no time for your family? \_\_\_\_\_

Is your communication with your business partner(s) healthy and productive? \_\_\_\_\_

Do you fully understand the insurance you have and need? \_\_\_\_\_

Are you confident about your business's cashflow, including revenue and expenses? \_\_\_\_\_

Is there a budget? \_\_\_\_\_