

Discovery Matrix

Use the following tool as a means of discerning your needs, goals and vision.

Place your top three priorities in each quadrant, use the suggested list as a guide, and add any other priorities that occur to you.

What do I WANT to do NOW?	What do I WANT to do LATER?

Business Goals

- Create a succession plan
- Sell the business now
- Bring in a partner
- Buy out my partner
- Create a shareholders' agreement
- Diversify my equity
- Wind up my business
- Develop my successor
- Develop a business continuity plan
- Create an advisory board
- Communicate my plans to all stakeholders

What do I NEED to do NOW?	What do I NEED to do LATER?

Personal Goals

- Plan my retirement
- Get organized
- Take better care of myself
- Manage my expenses
- Educate my children about finances
- Create a legacy
- Create a family employment policy
- Take care of my parents
- Transfer values to my children
- Create a family mission statement
- Write a will

For more resources and information about business succession planning, please arrange a meeting with one of our BMO Private Banking professionals.



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