



B&C Discovery Matrix

Name: _____

Email: _____

Phone: _____

We have created a diagnostic tool specifically catered to assist in the identification and prioritization of critical personal and business issues unique to each entrepreneur. Based on the nature of the enterprise, industry, stage of growth, and ownership dynamics (amongst other factors), owners and business leaders require integrated solutions that are in harmony with their personal and business objectives. By selecting the most important objectives, challenges, opportunities and/or strengths relevant to you and your business, B&C can develop custom strategies to build value through our multi-disciplinary approach.

Start the process by checking the boxes next to the issues that are most important to you and your business situation. Once completed, please send to kristinc@bcasi.net.

✓	Objectives	✓	Challenges	✓	Opportunities	✓	Strengths
<input type="checkbox"/>	Retire within 5,10, or 15 years	<input type="checkbox"/>	Paying too much in taxes	<input type="checkbox"/>	Incentive compensation planning for key employees	<input type="checkbox"/>	Solid base of customers
<input type="checkbox"/>	Increase cash reserve	<input type="checkbox"/>	Held hostage by key employees	<input type="checkbox"/>	Create a family legacy	<input type="checkbox"/>	Known for quality
<input type="checkbox"/>	Transfer business to family member(s) or key employee(s)	<input type="checkbox"/>	Balance Sheet cash poor	<input type="checkbox"/>	Tax minimization planning	<input type="checkbox"/>	Great reputation
<input type="checkbox"/>	Protect personal/business assets	<input type="checkbox"/>	Finding the right advisors	<input type="checkbox"/>	Asset protection strategies	<input type="checkbox"/>	Relationship with customers
<input type="checkbox"/>	Maximize business value	<input type="checkbox"/>	No existing wealth accumulation plan	<input type="checkbox"/>	Business is growing	<input type="checkbox"/>	Relationship with suppliers
<input type="checkbox"/>	Reduce taxes	<input type="checkbox"/>	No existing business succession plan	<input type="checkbox"/>	Favorable employee market	<input type="checkbox"/>	Relationships with regulators/legislators
<input type="checkbox"/>	Secure family's future	<input type="checkbox"/>	Business wouldn't go on without me	<input type="checkbox"/>	Acquisition opportunities	<input type="checkbox"/>	Non-discretionary products
<input type="checkbox"/>	Assure business continuation	<input type="checkbox"/>	Business and personal assets not coordinated sufficiently	<input type="checkbox"/>	Increased need for our product/services	<input type="checkbox"/>	Weak competition
<input type="checkbox"/>	Create wealth accumulation plan	<input type="checkbox"/>	Unclear long-term objectives	<input type="checkbox"/>	Balance Sheet is strong	<input type="checkbox"/>	High barriers to entry
<input type="checkbox"/>	Retain key employees	<input type="checkbox"/>	Pledged personal assets	<input type="checkbox"/>	New exit strategies	<input type="checkbox"/>	Not capital-intensive
<input type="checkbox"/>	Review CPA, attorney, other advisers	<input type="checkbox"/>	No key employee incentive plans	<input type="checkbox"/>	Learn what my business is worth	<input type="checkbox"/>	Growing industry
<input type="checkbox"/>	Explore exit strategies - ESOP, Third party sale	<input type="checkbox"/>	Current advisors don't work together	<input type="checkbox"/>		<input type="checkbox"/>	Highly profitable
<input type="checkbox"/>		<input type="checkbox"/>	Integrating personal and business planning	<input type="checkbox"/>		<input type="checkbox"/>	

Date Completed: _____

