

ROADMAP ASSESSMENT



Highlights

1. Customized deliverable tool
2. Combines recommendations from assessments with owner's goals
3. Develops detailed actions plans with dates to keep owner on track
4. Creates a plan that looks at owner's personal and business objectives
5. Highly actionable and easy to use

The Road to Success

The Roadmap Tool combines the analytical power of the ValuCompass assessments with the knowledge and expertise of an advisor. The result is an actionable deliverable that is specific to the individual owner and sets up a guided implementation.

Roadmap is used by those who are looking to increase the value of their planning engagements with deep data and a focused set of tasks. These action items keep the owner on track to align their personal goals with their business goals. With Roadmap, business owners will be working closely with advisors to fix relevant issues and add value.

After having completed both the Discover Assessment and the Protect Assessment, Roadmap is the best way to connect the two and move forward. The Roadmap Tool keeps both the Discover and Protect reports at the forefront of planning, shows how these reports are linked, and helps guide the owner to success.