

OWNER'S SCORECARD™

Name: _____ Updated: _____

FIVE-YEAR TARGETS		Year 1	Year 2	Year 3	Year 4	Year 5
TIME	Operator hrs/wk					
	Owner hrs/wk					
	Personal hrs/wk					
	Total hrs/wk	168	168	168	168	168
CASH FLOW	W-2 Salary annual					
	Owner Distributions after tax					
	Other Income					
	Total Cash Flow per year					
WEALTH	Market Equity Value					
	Savings + Investments					
	Real Estate net of mortgage					
	Total Net Worth					

MARKET VALUATION TARGET

Translate your wealth goal into the business value and financial performance it requires.

UNDER THE WEALTH LINE		Year 1	Year 2	Year 3	Year 4	Year 5
ENTERPRISE VALUE	Revenue					
	Net Income					
	Normalized EBITDA trailing twelve months					
	Multiple					
	Enterprise Value EBITDA × Multiple					
MARKET EQUITY VALUE	Debt					
	Cash					
	Phantom Stock long-term incentives					
	Working Capital % of revenue					
	Market Equity Value after Net Debt and Phantom Stock					