



Business Plan—Worksheet

In order to “close the gaps” that are preventing you from operating a true Legacy Wealth Management practice, you need a plan. The plan will be based on the goals you identified in your “Vision Worksheet” and will include tactics that are based on the gaps you identified in your “Gap Analysis.” It is important to prioritize the goals you want to achieve and the gaps you want to close. If you take on too much at once, it will seem overwhelming and may cause you to abandon the process.

Begin by identifying your top five goals (from the “Vision Worksheet”) and the gaps (“choose from the “NO” answers on the “Gap Analysis”). For each goal or gap, fill out the following information to create your business plan. (Note: this is a writable pdf—you can save the document, type in the information, share it with team members or other accountability partners, and update it as you make progress).

Use as many worksheets as needed to create your plan. As you succeed in achieving goals and closing gaps, go back to your “Vision Worksheet” and “Gap Analysis” to identify others you want to work on.

(Note: the “Vision Worksheet” and “Gap Analysis” can be obtained from your Thornburg Investment Consultant.)

BUSINESS PLAN	
Date	
Goal (from “Vision Worksheet”) or Gap (from “Gap Analysis”)	
Desired Completion Date	
Person(s) Responsible	

Identified Resources	
Team Resources (time, expertise, accountability)	
Home Office Resources (tools and/or people)	
Wholesalers/Asset Manager Resources (tools and/or people)	
Internet/Online Resources	
Executive Coaches	
Additional Resources Needed	
Action Steps	
Frequency of Status Updates/Check-Ins (scheduling the actual dates will help make you more accountable)	
Current Status	

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