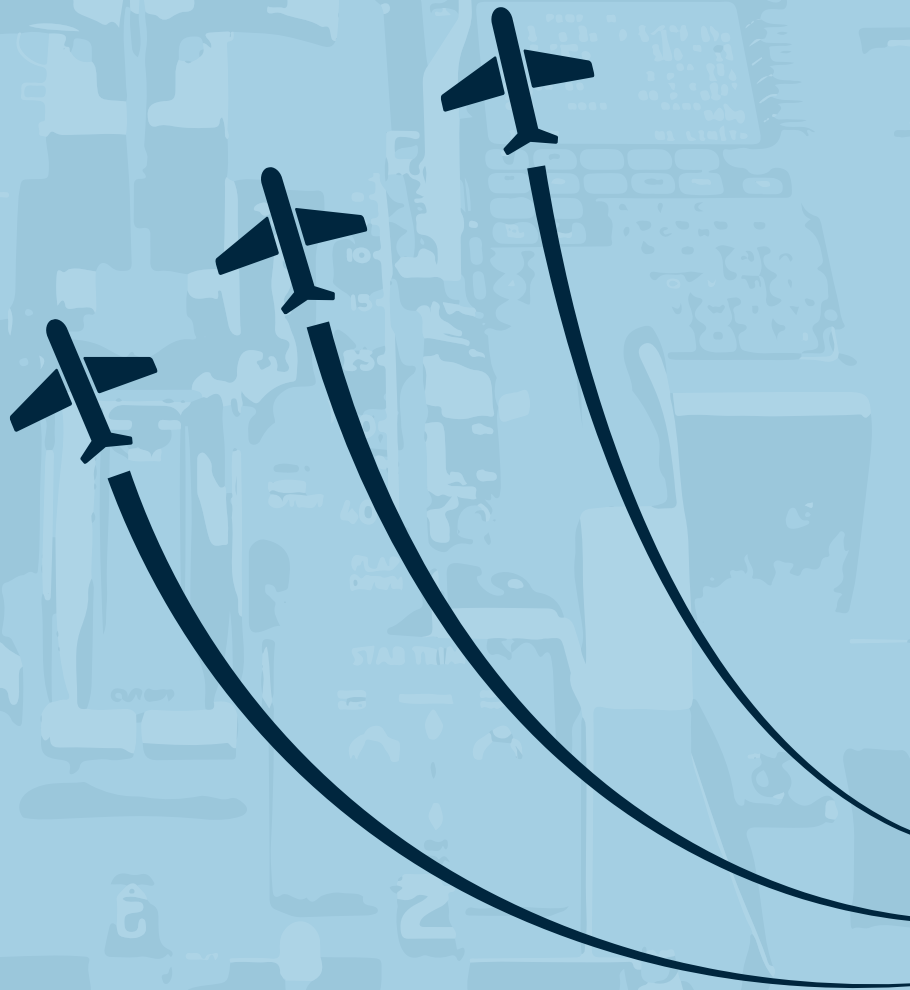


YOUR LEGACY VISION™



PFD
GROUP INC.

www.pfd-group.com
(720) 295 4888





Name:

Company:

Year:

Quarter:

Email:

Phone:



INTENT

With this tool, we want to give you time to reflect and work on your business, to clarify where you want to focus, and to identify where you can capitalize on growth opportunities.

With the amount of responsibility that comes with running a high-growth business, we know that it is incredibly difficult to balance priorities in all areas of our lives.

We want you to build a business that thrives that creates a legacy you're proud of and that supports what's most important to you. With our CEO Growth Forum, we will help give you the tools and the support to run your business in a way that backs your life and your priorities.

Please take this Legacy Vision™ tool as an opportunity to reflect on how far you've come as a business leader, and to vision forward where you want to go.

REFLECT

It is so important to celebrate all that you've done! Please take a moment to reflect on you and your team's past accomplishments and what is most important to you right now.

1. Where did you start? How far have you come?

2. Put together a list of "prouds". Take 10 minutes to list your achievements, even if they only seem somewhat relevant.

3. Where are you right now? What is most important to you?

VISION FORWARD

Put yourself into a inspiring setting, and look three years into the future. Envision a world that you'd love to create and be a part of.

Create a vision - it can be prose, bullet points, or even drawn. Give yourself 15 to 30 minutes to do this, and give yourself 30 minutes at most to review and re-draft.

TIPS

- Allow yourself to consider all areas of your life - family, marriage, spirituality, etc.
- Don't worry right now about how you'll get to the place that you're envisioning. Keep in mind that vision and strategic plan are not synonymous. The vision is where you are going, whereas the strategic plan is how you're going to get there.
- Allow yourself to step into the future and visualize everything as it has happened.
- Write from the heart, and allow yourself to dream and wonder what might be possible.

QUESTIONS TO CONSIDER

- How big is your business? Number of employees? Physical Volume? Number of locations? How many years does your company last for?
- Who do you serve with your business? Who do you serve in other areas of your life?
- What is the experience like working with you? What is your customer experience like? What is your experience with your partners and vendors? What makes that experience unique?
- What awards and certifications do you want to win with your business?
- What is your impact? How do you want to be remembered?
- How long are you working? How much time do you spend with family and friends? What is your relationship with your family and friends like?
- What does your ideal day look like? What does your ideal week look like? What does your ideal month look like?
- What are you doing with your free time? What are you doing on weekends and holidays? Where are you traveling?
- What are your hobbies? What are you doing to stay physically and mentally strong?

VISION FORWARD

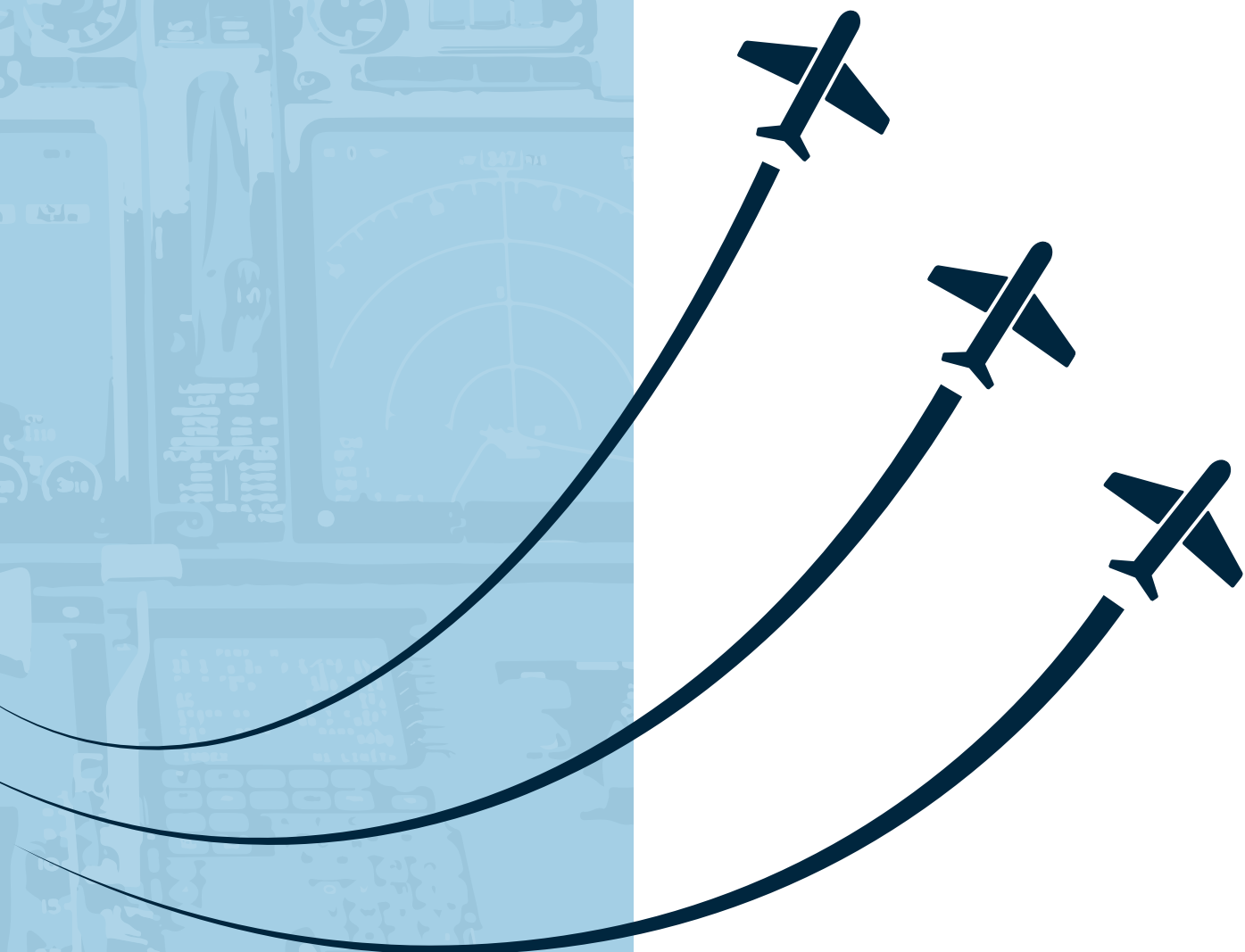
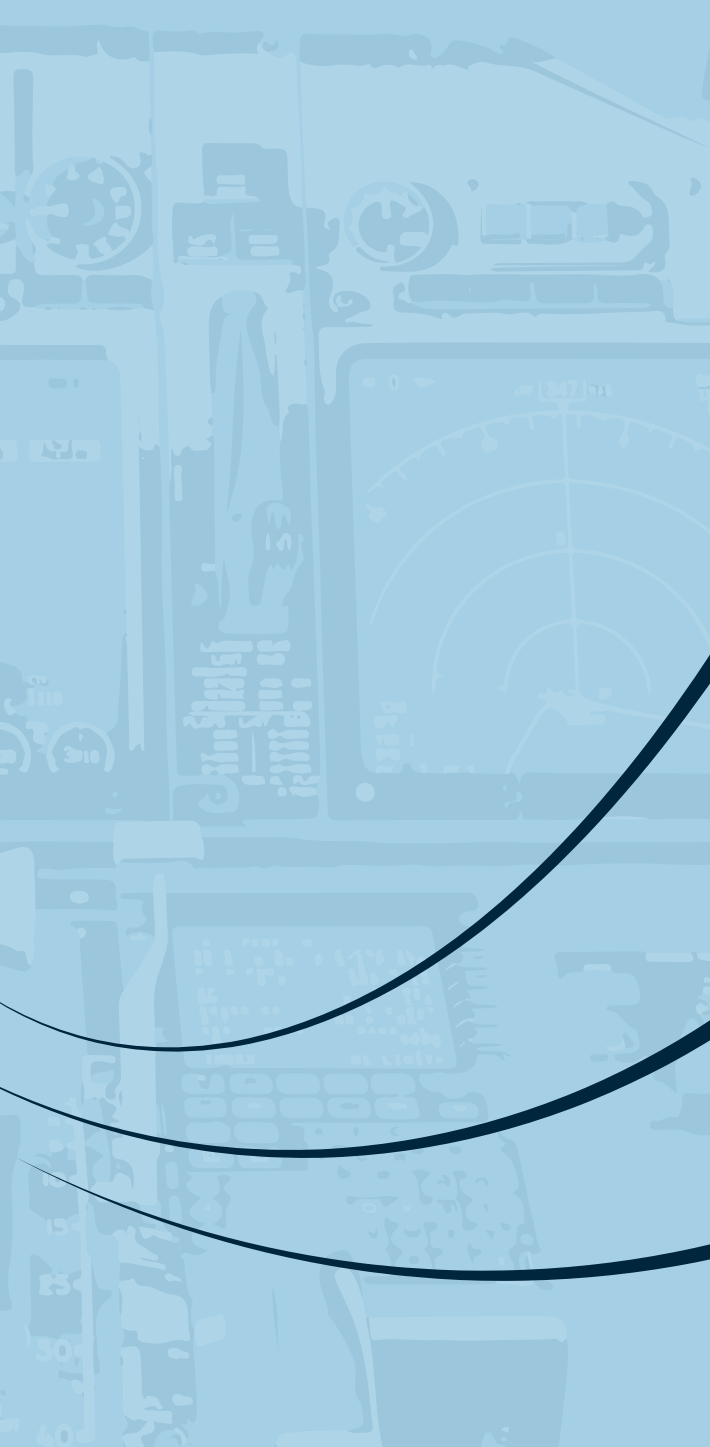
Use this space to brainstorm, write notes on, and draw out your vision.

VISION FORWARD

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ANY QUESTIONS? PLEASE CONTACT:



PFD
GROUP INC.

Ethan Martin
PRESIDENT

emartin@pfd-group.com

(720) 295 4888

www.pfd-group.com