



ENTREPRENEUR

Wealth-being self-*assessment*

Thank you for downloading this **Amida™** Financial Wealth-Being Self-Assessment. Crafted for the ambitious and the driven, this questionnaire serves as a litmus test to gauge how attuned your current financial strategies are with your entrepreneurial aspirations.

Reflect on each question to discern the alignment of your strategies with your goals:

START-UP AMBITIONS

If you're on the cusp of kick-starting your own venture, do you have a clear financial blueprint to guide you through the initial stages, ensuring your personal finances are secure while you invest in your dream?

Completely	Considerably	Moderately	Not at all	I really don't know
------------	--------------	------------	------------	---------------------

BUSINESS GROWTH & EXPANSION

For those already in the business realm, have you identified and streamlined your financial strategies to fund your expansion, ensuring future growth without compromising current stability?

Completely	Considerably	Moderately	Not at all	I really don't know
------------	--------------	------------	------------	---------------------

FUNDING & CAPITAL

As you look towards propelling your venture, have you explored a diverse array of strategic funding options? Are you informed about the benefits and drawbacks of each, be it venture capital, angel investors, or other financial avenues?

Completely	Considerably	Moderately	Not at all	I really don't know
------------	--------------	------------	------------	---------------------

DAY-TO-DAY FINANCIAL MANAGEMENT

In managing the intricate daily affairs of your business, from tax strategies to employee benefits, do you feel confident in your current financial planning, or do you sense gaps that need addressing?

Completely	Considerably	Moderately	Not at all	I really don't know
------------	--------------	------------	------------	---------------------

TRANSITION & SUCCESSION PLANNING

If you've reached a point where you're contemplating the next phase, be it handing over your business or an exit strategy, have you charted out a financially sound transition plan?

Completely	Considerably	Moderately	Not at all	I really don't know
------------	--------------	------------	------------	---------------------

PERSONAL WEALTH THROUGH BUSINESS

As you harness your business as a vehicle for personal wealth, do you have strategies in place to optimize this wealth generation, ensuring you're achieving personal financial growth alongside business success?

Completely	Considerably	Moderately	Not at all	I really don't know
------------	--------------	------------	------------	---------------------

HOLISTIC FINANCIAL VISION

If any of these questions raised doubts or if you identified areas where your current plans seem inadequate, it might be indicative of the need for more specialized financial guidance. As an entrepreneur, your financial landscape is uniquely complex, requiring strategies that cater to both business and personal aspirations. We specialize in understanding this duality and offering solutions tailored to fuel both these realms.

Completely	Considerably	Moderately	Not at all	I really don't know
------------	--------------	------------	------------	---------------------

If any of these questions raised doubts or if you identified areas where your current plans seem inadequate, it might be indicative of the need for more specialized financial guidance. As an entrepreneur, your financial landscape is uniquely complex, requiring strategies that cater to both business and personal aspirations. We specialize in understanding this duality and offering solutions tailored to fuel both these realms.

What has become clear to you in completing this self-assessment?

CONNECT WITH US



ADDRESS
PHONE
EMAIL

218 NW 24th Street, Miami, FL 33127
+1 305.809.0790
experience@amidawealth.com 218 NW

Transform YOUR VISION OF WEALTH™