

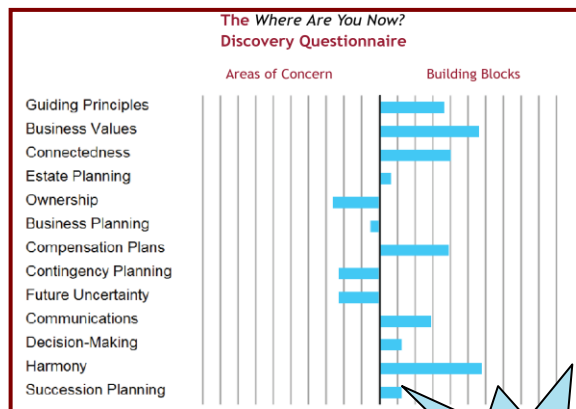
Where Are You Now? The Discovery Questionnaire

Our Discovery Questionnaire is designed to help you and your family members gain a snapshot of:

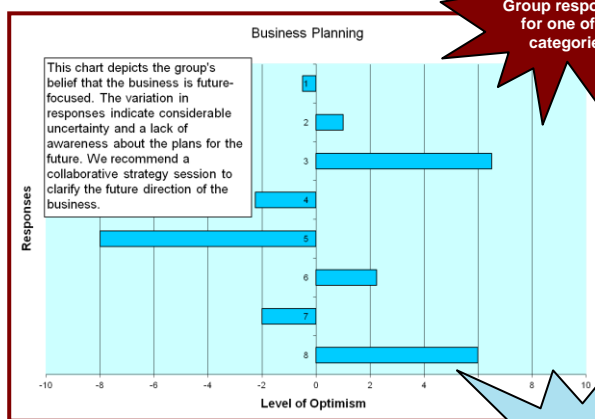
- The family and business situation
- The nature of the issues and concerns that exist within the family and the family business
- The areas where family consultation and business planning activity are most needed

It is an easy-to-use tool that will help you identify the different perspectives family members have around factors that are important to the continuity of your family business. It provides a benchmark of where you are now in terms of its business, succession, retirement planning activity etc.

As it also identifies the areas where members are consistent in their perceptions, it is a valuable tool in identifying your family's common interest. On the other hand, it helps to identify the conflicts and differences of opinion that need to be resolved to facilitate the development of a successful family business and/or transfer of ownership and management to the next generation.



Individual



Group responses for one of 13 categories

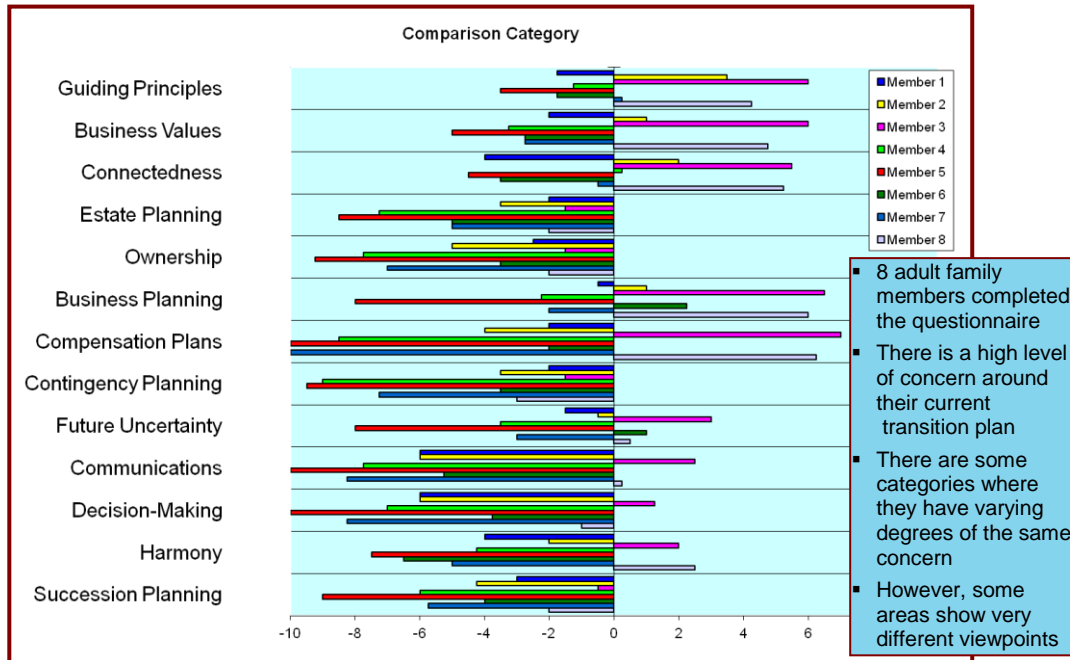
Family

Methodology

- ♦ Each member of the family business independently completes the questionnaire. All submissions are confidential as each person is assigned their own password to complete the survey online. A hard copy of the questionnaire is available for those family members who do not wish to complete the survey online.
- ♦ SuccessCare interprets the results to identify each individual's viewpoints on thirteen different subjects.
- ♦ Each family member receives a chart showing their own individual results. The chart highlights any building blocks for the future or areas of concern going forward.

- ♦ We then provide you with a final report that shows the overall family picture. This report graphically combines the individual results to deliver a more detailed synopsis of each of the 13 key categories and profile of the key issues, concerns, potential conflicts and building blocks for the future. Each family member is assured of confidentiality as their viewpoints are anonymously blended with those of the rest of the family.

Penmaen Consolidated Responses



Issues Identified from Penmaen Questionnaire

1.	No confidence in ability to adapt to change
2.	Uncertainty around future direction of business / lack of direction and processes
3.	No clarity around roles and responsibilities
4.	Poor communication
5.	No process to determine compensation
6.	Lack of input into major decisions / No decision-making or redress process
7.	Unsure about estate plans
8.	Uncertainty around future leadership and family involvement
9.	Some concern around keeping family connected yet preserving individual dreams
10.	Concern over current and future ownership / rules for buying, selling, transferring shares
11.	Concern about future financial viability, wealth preservation
12.	No transition plan
13.	Conflict arising from lack of communication, decision-making and authority, independence issues, ownership, involvement in the business etc.

We would be happy to provide you with a sample of a full analysis and report.

Getting Started

- You can test the questionnaire at www.successcare.com/survey.cfm.
- To enroll your family business clients, please complete the order form on the next page.
- We recommend that all adult family members complete the survey, including in-laws.
- We provide you with instructions on 'how to begin the survey' to distribute to each family member.
- The instruction sheet will detail a due date for completion of the survey. If any family members would prefer to complete a hard copy of the survey, please contact Nicole at 519-780-2002.
- The cost is just \$500 cdn for up to 6 family members. Additional family members are \$50 per person. Payment can be made by cheque (payable to **BDO Canada LLP**), Visa or MasterCard.
- We will email you the completed report within one week of receiving all survey submissions. Alternatively, you can engage us to present the findings and discuss how the family might use the findings to move forward in their transition plan.

"Where Are You Now" Discovery Questionnaire

REGISTRATION FORM

Your Name	
Your Phone	
Your Email	
Your client's family name	
Your client's business name	
Your client's website	
Family or Non-family	Family <input type="checkbox"/> Non-family <input type="checkbox"/>
Submission due date	

Analysis and report will be delivered one week after all submissions have been received.

Participant First Name:	Participant Email Address:
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Payment method <i>**\$500 fee includes 6 family or group members. Each additional member is \$50.</i>	<input type="checkbox"/> Visa <input type="checkbox"/> MasterCard <input type="checkbox"/> Cheque Tax on Canadian purchase only. Circle one: GST 5% or HST 12% / 13% / 15%
Card number	
Expiry date	
Name on card	
Signature	

**Please fax your completed form to Nicole at (519) 837-9883
or email to nicole@successcare.com**

