The Intentional Advisor
Practice Assessment

With *Purpose*

- Why are you a financial advisor?
- Who do you have the unique ability and desire to serve?
- What kind of impact do you hope to make in the world?

On *Purpose*

PRACTICE ASSESSMENT

High-Value

QUESTION	SCORE (1-5)
1. Can your advice stand alone?	
2. Does your process deliver results?	
3. Can you explain your process succinctly?	
4. Do your clients feel a sense of security by working with you?	
TOTAL	/20

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Client-Centric

QUESTION	SCORE (1-5)
1. Do you know exactly who you serve?	
2. Can you tell them what value they will get from working with you?	
3. Did you design every aspect of your practice around that client?	
4. Do you have a written Ideal Client Profile?	
TOTAL	/20

Comprehensive Financial Planning

QUESTION	SCORE (1-5)
1. Have you defined comprehensive planning for your Ideal Client?	
2. Is it truly comprehensive?	
3. Do you have a step-by-step, documented initial planning process?	
4. Do you have defined annual planning process?	
TOTAL	/20

Experience

QUESTION	SCORE (1-5)
1. Do you have an emotionally significant initial experience?	
2. Does it explore fears, values, goals and resources?	
3. Does your initial experience focus on the client 90% of the time?	
4. Have you looked at how your practice makes your client "feel"?	
TOTAL	/20

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How are you doing?

High-value	Client-centric	Comprehensive Financial Planning	EXPERIENCE	TOTAL
				/80

NOTES & COMMITMENTS

Don't forget to submit your results via the survey link and schedule a FREE 30-minute coaching session with me!

–Lucila