

# myadvisorvalue.com

rate your current advisor value 1-7

1 2 3 4 5 6 7  
Disagree Agree

I have clearly identified my target audience(s).

Most of my clients would be willing to introduce me to a friend, colleague or relative.

I have created very compelling reasons why my target prospects should become my clients.

I have a structured process for creating referrals, introductions or recommendations.

Prospects clearly understand who I am, what I do and why they should trust me with their wealth.

I have a clearly defined plan to promote myself and build public awareness.

I am very proficient at understanding and managing the expectations of my clients.

I have created an 'exceptional client experience.'

I do not neglect any of my clients.

I am very skillful at promising my behavior to my clients.

My clients clearly understand my investment philosophy and process.

I know how to improve and increase my 'Personal Value.'

I have clearly defined Why I am an Advisor, Who I am, What I believe and How I make decisions.

My profiling system requires prospects to "invest their time... before they invest their money."

I ask exceptional questions that are designed to uncover the real needs of prospects and clients.

I most likely have clients not suited for my current business model.

Add 'em all up!

Date \_\_\_\_\_



Keep for your records.  
Update every quarter.

#tangiblealpha