
A S S E S S M E N T

Hiring a consultant or coach is a decision made with careful thought. The following assessment will help you in making your decision.

Instructions: Review each question and place a checkmark in the box next to Yes or No. When complete, add the number of Yes and No answers and capture your totals in the spaces provided.

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|-----|---|-----------------------------------|----------------------------------|
| 1. | I would like to have more time with my top clients. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 2. | I want to focus on higher net worth clients. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 3. | I want all of my clients to receive excellent service, and I am concerned about the value some of my clients are receiving. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 4. | I am unable to serve all of my clients effectively. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 5. | I want more flexibility in my schedule. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 6. | I am unwilling to aggressively acquire clients because my practice lacks capacity. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 7. | I would like to do more financial planning in my practice. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 8. | I would like to offer more services in my practice. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 9. | I would increase my annual fees if I were confident I could provide more service and attention. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 10. | I do not have systems in place to manage most activities in the practice. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 11. | I underutilize my staff. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 12. | Roles and responsibilities lack definition in the practice. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 13. | I am not efficient with my time. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 14. | I want a continuation plan for my practice. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 15. | I am willing to change. (CRITICAL) | <input type="checkbox"/> Yes (+2) | <input type="checkbox"/> No (-2) |

Add the number of Yes and No responses and write the number here. → _____

10 or more Yes responses: Hiring a consultant/coach may be a good decision.