

the advisor2business leader assessment

You're a solid financial advisor, but just how solid are you as a business leader?

- I know the critical financial metrics for my business and I review trends monthly.
- I have documented processes for all areas of my business, so I am not worried if I lose a key employee.
- I conduct a consistent and thorough process for training my team that includes role playing, assessments, and mutual reporting over 90 days.
- I operate with an annual budget – for the business and personally.
- When COVID hit I was prepared because my business already had a plan in place.
- I have conducted time studies and have dollarized services to assess profit margins – I know the cost to get tasks done.
- My values are reflected in how my time is spent. I regularly schedule time for business planning, team management, and personal development.
- I have a consistent, routine process for enhancing my reputation both online and off.
- I have a positive relationship with my broker dealer and know the key players by name.

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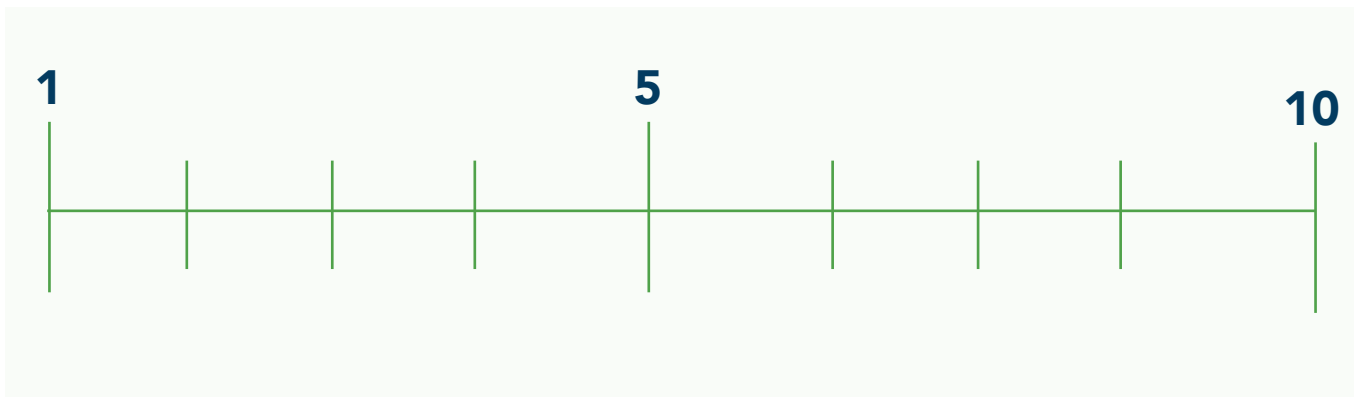
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- I know my overhead as a percentage of households served.
- I know who my least expensive (most profitable) clients are.
- I know who my most expensive (least profitable) clients are.
- I have an organizational chart for my business today and where I want to take it in 5 years.
- I have an accurate business valuation and understand the key metrics that drive it.
- I have consistent and predictable processes for new clients and annual communication.
- I have a calendar of activities, events, and days out of the office for the next year, created prior to the close of the current year.
- I value the opinion of other professionals and willingly seek out insight and advice from colleagues that I respect.
- I allocate at least 5% of my time and budget for the training and professional development of my current team and myself.
- I know the profit margins for each service and product my firm sells.

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Based on your answers to the questions, how would you currently rank yourself as a business leader on a scale of 1-10?

1 = strongly disagree and 10 = strongly agree



We ask that you take some time to reflect on your answers. We are prepared to help you with every one of these categories. Come along on the journey with us to be a better business leader.