

Exercise 11.1
Checklist for Assessing an Advisor

10 minutes

Rate your advisor's responses to your communications on a scale of 1 to 5 (with 5 being the highest), then look at the overall picture of how comfortable you are working with this person.

Advisor Response	My Comfort Level				
Does the advisor reflect back your vision, goals, hopes, and dreams in such a way that you can recognize yourself in that "mirror"?	5	4	3	2	1
Does the advisor see what makes you unique?	5	4	3	2	1
Is the advisor compassionate and empathetic?	5	4	3	2	1
Does the advisor respond tactfully to sensitive personal information?	5	4	3	2	1
Do you feel a connection and a bond?	5	4	3	2	1
Is this someone in whom you feel comfortable confiding?	5	4	3	2	1
Does the advisor use plain English and help you understand the issues?	5	4	3	2	1
Does this person give you credit for your ideals, as well as your success?	5	4	3	2	1
Does this person get excited about the thought of helping you create plans that will express and pass on your values as well as money?	5	4	3	2	1
Does the advisor seem like a team player?	5	4	3	2	1
Does he or she listen as well as talk?	5	4	3	2	1
Does the advisor pick up on subtle cues from you and your partner or spouse? Or do you have to insist on important points over and over to get the point through?	5	4	3	2	1
Would you enjoy working with this person as a cocreator of your life and legacy plan?	5	4	3	2	1
Do you trust and respect this advisor?	5	4	3	2	1