

The Wealth Clarity Diagnostic™

On a scale of 1-10, indicate the degree to which you agree (6-10) or disagree (1-5) with the statements below. Once you are finished, total your score.

1	I am confident that my financial advisor has a complete understanding of my financial situation, as well as my passions and what I am trying to accomplish.	<input type="text"/>
2	I am confident that my financial advisor understands and considers my entire family's concerns and desires.	<input type="text"/>
3	I am comfortable with the overall performance of my portfolio and with the consistency and effectiveness of my advisor's communication with me.	<input type="text"/>
4	I am comfortable with how my financial advisor pursues, assesses and advises me on opportunities that will enable me to achieve my objectives.	<input type="text"/>
5	My financial advisor's approach with me and my family gives us a feeling of confidence that increases constantly.	<input type="text"/>
6	I am comfortable with the plans we have in place to address all future cash flow events such as costs for college education, weddings, etc.	<input type="text"/>
7	I am confident that should anything unexpected happen to anyone in my family, it would not impact our financial situation.	<input type="text"/>
8	The financial strategy my advisor has laid out for me provides a clear road map that guides my on-going decisions.	<input type="text"/>
9	My financial advisor coordinates the work of my various other advisors. This provides a simpler, more effective process for me to manage my financial life.	<input type="text"/>
10	My advisor has freed me up from worrying about financial contingencies and enabled me and my family to focus more on enjoying our lives.	<input type="text"/>

When considering my wealth, the area I am least comfortable with is: (use back of page if necessary)

Total Score

Name

Email

Contact Number