



Activity:

Team Member Assessment

This activity involves assessing where you currently stand in the process of building your trusted team of financial advisors, and developing a plan for completing that process based on your current and projected needs.

Activity: Team Member Assessment

Fill in each of the tables below by entering the information for all the members you already have on your financial advisement team. For each team member you have not yet selected, evaluate your current needs and your expected needs over the next five years, to determine whether you should begin working toward adding those members to your team to achieve your financial goals.

Financial Foundation Team Members

Financial Institution Contact

| Have This Team Member? | Yes | No |
|---|-----|----|
| Direct Contact or General Customer Service? | | |
| Trust Level (1-10): | | |
| Company: | | |
| Contact Name: | | |
| Contact Email: | | |
| Contact Phone: | | |
| My Account Info: | | |
| Notes: | | |



Activity: Team Member Assessment

Financial Mentor (Coach, consultant)

| Have This Team Member? | Yes | No |
|---|-----|----|
| Direct Contact or General Customer Service? | | |
| Trust Level (1-10): | | |
| Company: | | |
| Contact Name: | | |
| Contact Email: | | |
| Contact Phone: | | |
| My Account Info: | | |
| Notes: | | |



Activity: Team Member Assessment

Tax Preparer / Consultant

| Have This Team Member? | Yes | No |
|---|-----|----|
| Direct Contact or General Customer Service? | | |
| Trust Level (1-10): | | |
| Company: | | |
| Contact Name: | | |
| Contact Email: | | |
| Contact Phone: | | |
| My Account Info: | | |
| Notes: | | |



Activity: Team Member Assessment

Insurance Specialist / Company (auto, home, life etc.)

| Have This Team Member? | Yes | No |
|---|-----|----|
| Direct Contact or General Customer Service? | | |
| Trust Level (1-10): | | |
| Company: | | |
| Contact Name: | | |
| Contact Email: | | |
| Contact Phone: | | |
| My Account Info: | | |
| Notes: | | |



Specialized & Advanced Team Members

Attorney

| Have This Team Member? | Yes | No |
|---|-----|----|
| Direct Contact or General Customer Service? | | |
| Trust Level (1-10): | | |
| Company: | | |
| Contact Name: | | |
| Contact Email: | | |
| Contact Phone: | | |
| My Account Info: | | |
| Notes: | | |



Activity: Team Member Assessment

Real Estate Agent

| Have This Team Member? | Yes | No |
|---|-----|----|
| Direct Contact or General Customer Service? | | |
| Trust Level (1-10): | | |
| Company: | | |
| Contact Name: | | |
| Contact Email: | | |
| Contact Phone: | | |
| My Account Info: | | |
| Notes: | | |



Activity: Team Member Assessment

Mortgage Broker

| Have This Team Member? | Yes | No |
|---|-----|----|
| Direct Contact or General Customer Service? | | |
| Trust Level (1-10): | | |
| Company: | | |
| Contact Name: | | |
| Contact Email: | | |
| Contact Phone: | | |
| My Account Info: | | |
| Notes: | | |



Activity: Team Member Assessment

Financial Advisor

| Have This Team Member? | Yes | No |
|---|-----|----|
| Direct Contact or General Customer Service? | | |
| Trust Level (1-10): | | |
| Company: | | |
| Contact Name: | | |
| Contact Email: | | |
| Contact Phone: | | |
| My Account Info: | | |
| Notes: | | |



Activity: Team Member Assessment

Financial Consultant

| Have This Team Member? | Yes | No |
|---|-----|----|
| Direct Contact or General Customer Service? | | |
| Trust Level (1-10): | | |
| Company: | | |
| Contact Name: | | |
| Contact Email: | | |
| Contact Phone: | | |
| My Account Info: | | |
| Notes: | | |



Activity: Team Member Assessment

Specialized Investments Advisor

| Have This Team Member? | Yes | No |
|---|-----|----|
| Direct Contact or General Customer Service? | | |
| Trust Level (1-10): | | |
| Company: | | |
| Contact Name: | | |
| Contact Email: | | |
| Contact Phone: | | |
| My Account Info: | | |
| Notes: | | |



Activity: Team Member Assessment

College Planner

| Have This Team Member? | Yes | No |
|---|-----|----|
| Direct Contact or General Customer Service? | | |
| Trust Level (1-10): | | |
| Company: | | |
| Contact Name: | | |
| Contact Email: | | |
| Contact Phone: | | |
| My Account Info: | | |
| Notes: | | |



Activity: Team Member Assessment

Other Specialized Team Member

| Have This Team Member? | Yes | No |
|---|-----|----|
| Direct Contact or General Customer Service? | | |
| Trust Level (1-10): | | |
| Company: | | |
| Contact Name: | | |
| Contact Email: | | |
| Contact Phone: | | |
| My Account Info: | | |
| Notes: | | |



Activity: Team Member Assessment

Other Specialized Team Member

| Have This Team Member? | Yes | No |
|---|-----|----|
| Direct Contact or General Customer Service? | | |
| Trust Level (1-10): | | |
| Company: | | |
| Contact Name: | | |
| Contact Email: | | |
| Contact Phone: | | |
| My Account Info: | | |
| Notes: | | |



Activity: Team Member Assessment

Other Specialized Team Member

| Have This Team Member? | Yes | No |
|---|-----|----|
| Direct Contact or General Customer Service? | | |
| Trust Level (1-10): | | |
| Company: | | |
| Contact Name: | | |
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