



LEADING ADVISOR

CLEAR YOUR ROADBLOCKS

How Do You Score on The Clear Values Scorecard?

To clearly understand your current situation, complete *The Clear Values Scorecard*™. Rate your reactions to each pair of phrases. Decide where you score on the scale from 1 to 10. Add up your total from each column.

	Financial Survivor												Financial Advisor
1.	I lack focus.	1	2	3	4	5	6	7	8	9	10		I follow a written 5-year vision and business plan.
2.	I am not making as much money as I would like.	1	2	3	4	5	6	7	8	9	10		I am fully satisfied with the amount of money I am making.
3.	I have to get myself pumped when I am selling.	1	2	3	4	5	6	7	8	9	10		I feel naturally excited about my work and I enjoy the selling process.
4.	I feel I am not getting enough referrals.	1	2	3	4	5	6	7	8	9	10		I am getting many great, qualified referrals.
5.	I feel that I am working too hard, with too many unqualified or C and D clients.	1	2	3	4	5	6	7	8	9	10		I am getting many new high-quality clients.
6.	I try to serve anyone and everyone.	1	2	3	4	5	6	7	8	9	10		I have branded my business and I am focused on a niche market.
7.	I do too many favors and I sell too many products.	1	2	3	4	5	6	7	8	9	10		I am focused on profitable products and services.
8.	I feel completely overwhelmed doing things I don't like to do.	1	2	3	4	5	6	7	8	9	10		I do what I love to do and have a hiring system to delegate everything else.
9.	I have a lot of conflict in my business relationships.	1	2	3	4	5	6	7	8	9	10		I manage my business relationships extremely well.
10.	I beat myself up when things don't go right and I have lost my enthusiasm for my business.	1	2	3	4	5	6	7	8	9	10		I always celebrate my successes and learn from my setbacks. I am achieving my true potential as an advisor.
	ADD COLUMN TOTALS												YOUR SCORE _____

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