



DISCOVERY INSIGHT WORKBOOK™





values

## VALUES

Once they have identified their top 5 values, have them provide a time in their life when each of these values was present.

Value:

Shared Example:

1.

2.

3.

4.

5.







# GOAL DETAIL WORKSHEET (GISOR)

Affirm the prioritized goal to ensure you have documented it correctly and then ask the below questions to have a deeper discussion on goal.

Goal:

Include in Planning Map™

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---

---

Why is this goal important to accomplish?

---

---

---

What supporting resources will assist in accomplishing this goal?

---

---

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What obstacles may prevent this goal from being accomplished?

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**Readiness:** Where are you on a scale of 1 to 5 to be able to take action today?

(1 being ready to take action and 5 not being ready to take action?)

1 2 3 4 5

Categorize the goal. (Completed Post-Discovery Meeting)

Goal Name:

A list of possible planning categories to name the goal – Survivor Income, Disability Income, Education Planning, Major Purchase, Retirement Income, Retirement Allocation, Long Term Care, Asset Allocation, Estate Planning, Business Planning, Business Succession, Charitable Planning



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Status: Completed  In Progress  Scheduled   
Deleted  Rescheduled  Tentative

Note: \_\_\_\_\_

Level 2 Name: (optional) \_\_\_\_\_

Begin Period: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ End Period: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

(Begin and End Period must fall between the Level 1 dates above.)

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Note: \_\_\_\_\_

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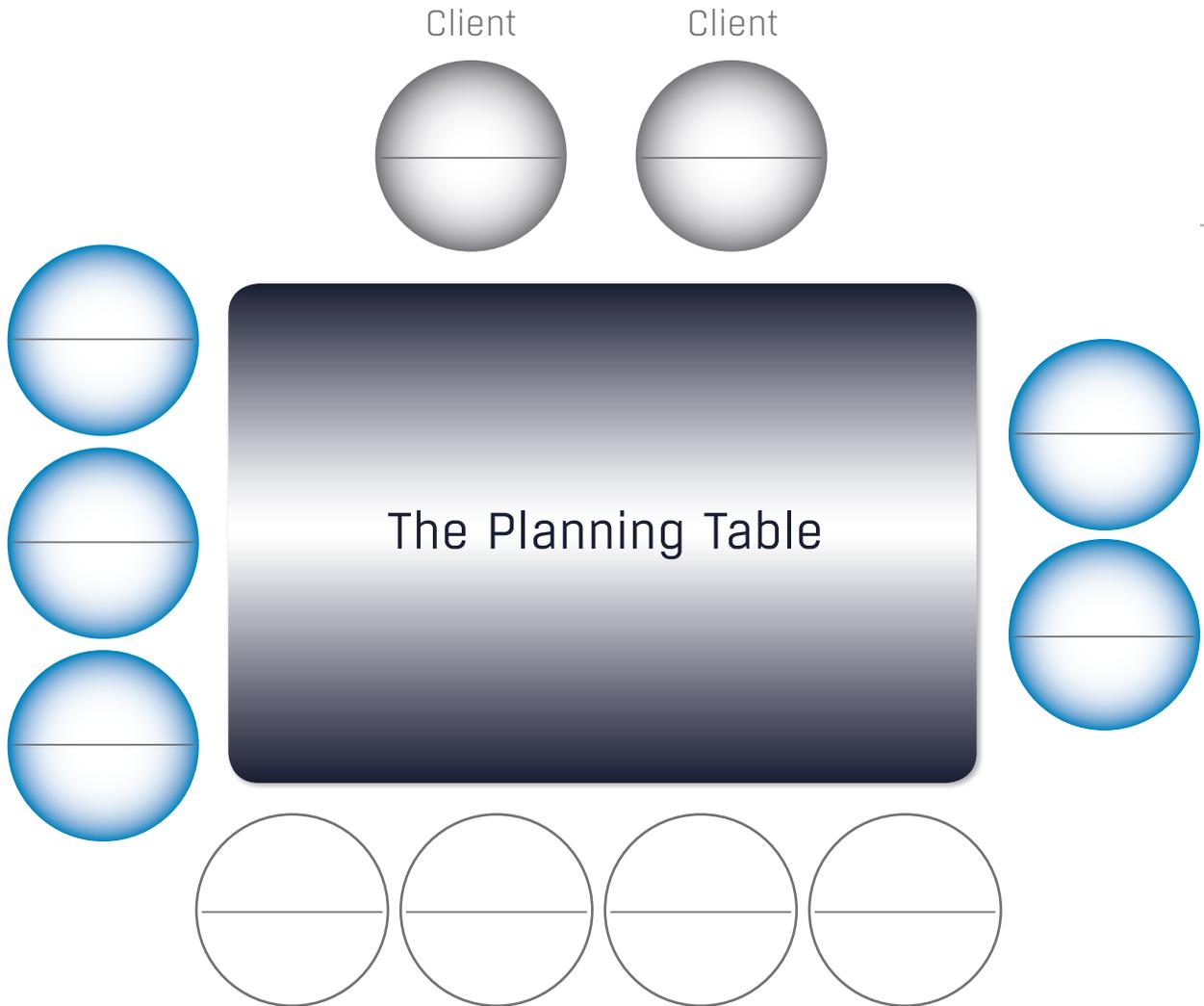
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# TEAM PROFILE

team profile



When faced with a challenging financial situation, who do you contact? \_\_\_\_\_

Team Member	Responsibility	Referral Source
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

## TEAM PROFILE

Effective planning requires a team approach as well as certain specific strengths from each member. Trust is the basis for all relationships and has significant implications regarding the ability to make progress and achieve goals. The goal of the Team Profile is to determine each team members effectiveness by evaluating each team member’s strength and trust level.

Rate each advisor on a scale of -3, -2, -1, 0, 1, 2, 3 where 3 indicates the team member is a team asset in the respective category and -3 indicates the team member may be a liability:

- R Relationship:** How well has this advisor maintained your relationship?
- D Discovery:** How effective are they at helping you achieve clarity before making a choice?
- S Solution:** How effective are they at introducing solutions you have implemented?
- M Management:** How effective are they at managing projects they initiate to a timely conclusion?

Rate each advisor on a scale of 1 to 10, with 10 representing a high score:

- C Credibility:** What is this advisor’s level of professional credibility? (10 indicates high credibility)
- R Reliability:** How reliable is this advisor? (10 indicates high reliability)
- I Intimacy:** How comfortable are you talking with this advisor regarding private or personal matters? (10 indicates high intimacy)
- S Self-Orientation:** What is your level of concern that the advisor places his or her interests ahead of your own? (10 indicates high self interest)

Team Member

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

R	D	S	M

C	R	I	S