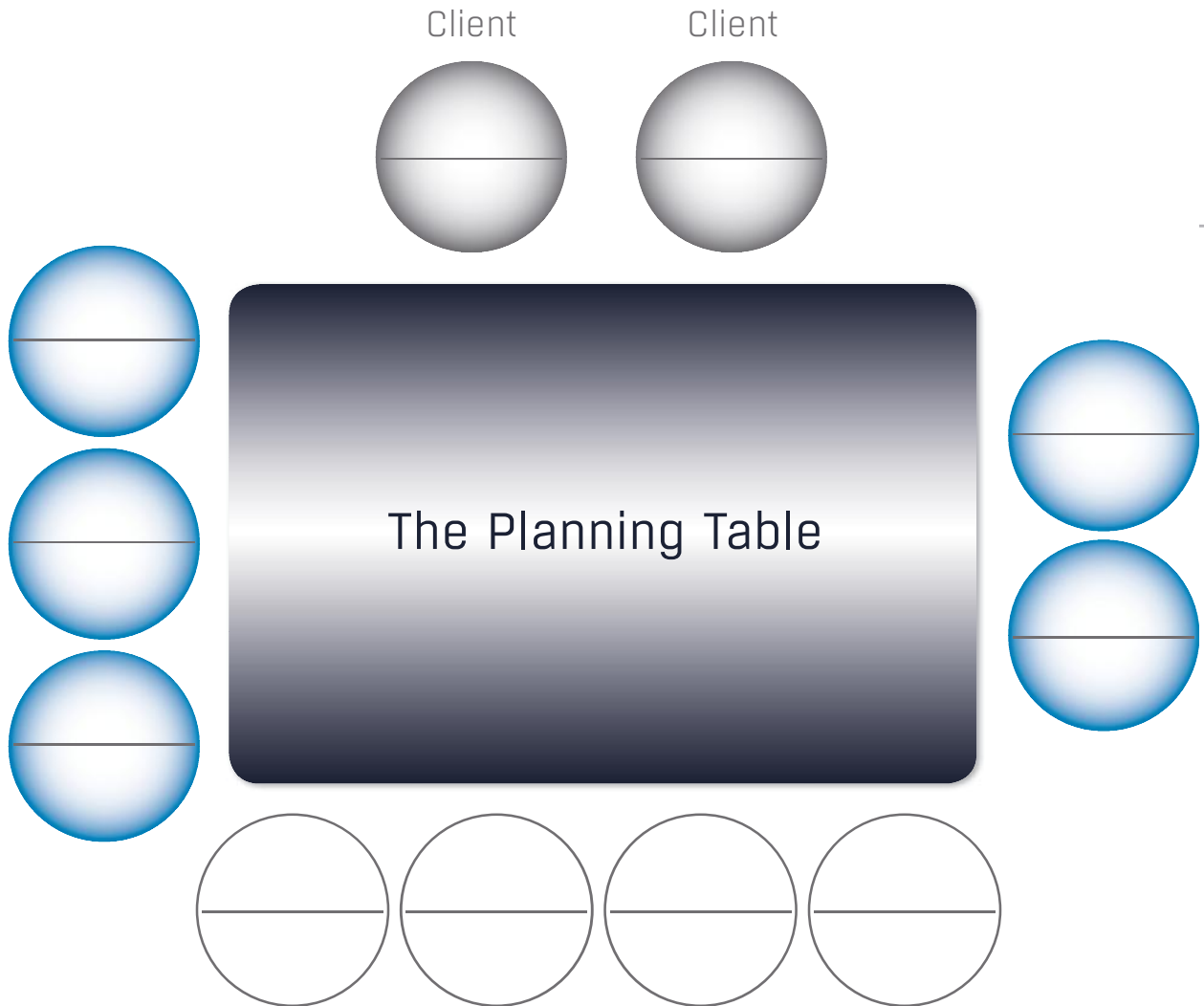


TEAM PROFILE

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