LEGACY

DISCOVERY INSIGHT

workbook

Name: ____________________ Date: ____ / ____ / ____

think-legacy.com

Discovery leads to clarity, and clarity leads to meaningful action. The Discovery Insight Workbook is designed to guide our conversation and capture the future you want to see happen.

Then, we'll build it together.

LEGACY

VALUES

» Help your client identify their values using the Legacy Values Card System™. Once you understand the top values guiding their decisions, ask for examples of where those values show up in their life.

Values

1.

2.

3.

4.

5.

Examples from Real Life:

VISION

- Most people don't have a clearly articulated vision, but they have a sense of how they want it to be. Take some time to help your client get clearer about the future.

- Below are a list of questions to help your client articulate their vision:

  "Do you have a sense of what you want the future to look like for your _______________ [business, family, finances, retirement, etc.]? Can you tell me about it?"

  "How would you know if you created a successful _______________ [life, business, retirement, etc.]? Give me an example."

  "If you were guaranteed to succeed at _______________ [whatever], what would you do?"

  "What are 5 things you want to be proud of in the future?"

  "What is it that you want to _______________ [have, be, do]?"

  "What will be happening in your life in 10 years? What won't be happening."

Notes:

GOAL INVENTORY WORKSHEET

» Our vision points toward our goals. Goals are stepping stones to the future we want. Below are a list of questions to help your client articulate their goals and objectives. Take notes and organize their goals on the Goal Inventory Worksheet on the next page.

"As you think about your Vision, what are some of the key goals we should discuss that will help you get there?"

"What are the issues that are on your mind that you would like to share with me today?"

"As you think about your future, both professionally and personally, what are the goals you would like to accomplish that would have you feeling successful?"

» A list of planning categories that may be important to discuss:

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

» Prioritize these goals by discussing which are the top 3. Organize their priority in the 'Goal Priority' column of the worksheet.

Notes:

GOAL PRIORITY WORKSHEET

Goal	Priority

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GOAL DETAIL WORKSHEET (GISOR™)

☐ *Include in Planning Map™*

» Affirm the prioritized goal to ensure you have documented it correctly and then ask the following questions to have a deeper discusson on their goals.

Goal

____

____

____

Why is this goal Important to accomplish?

____

____

____

What Supporting resources will assist in accomplishing this goal?

____

____

____

What Obstacles may prevent this goal from being accomplished?

____

____

____

Readiness: 1 2 3 4 5

» Where are you on a scale of 1 to 5 to be able to take action today? (1 = READY to take action and 5 = NOT READY to take action.)

Goal Name:

A list of possible planning categories: 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

GOAL ACHIEVEMENT™ WORKSHEET

PLANNING GAP

» Describe the gap that is being addressed:

PLACE OF MOST POTENTIAL

» Describe the recommendation that would assist in accomplishing this goal:

STRATEGIES

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PLANNING MAP™

Goal Name *(From Goal Detail Worksheet.)* ____________________

» Begin Period

date / /

» End Period

date / /

» Status:

☐ *Completed* ☐ *In-Progress* ☐ *Scheduled* ☐ *Re-Scheduled* ☐ *Tentative* ☐ *Deleted*

NOTES:

Level 2 Name *(Optional)* ____________________

» Begin Period

date / /

» End Period

date / /

» Status:

☐ *Completed* ☐ *In-Progress* ☐ *Scheduled* ☐ *Re-Scheduled* ☐ *Tentative* ☐ *Deleted*

NOTES:

Level 3 Name *(Optional)* ____________________

» Begin Period

date / /

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date / /

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PLANNING MAP™

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NOTES:

TEAM PROFILE

TEAM PROFILE FOR ____________________

name ______ *role*   *name* ______ *role*   *name* ______ *role*   *name* ______ *role*

name ______ *role*

name ______ *role*

name ______ *role*

The **PLANNING** *Table*

name ______ *role*

name ______ *role*

client name   *client name*   *most trusted advisor*

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

Team Member	Responsibility	Referral Source

TEAM PROFILE

TEAM PROFILE

Effective planning requires a team approach as well as a certain specific strength 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.

STRENGTH

Rate each advisor on a scale od -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?

(S) SOLUTION

How effective are they at introducing solutions you have implemented?

(D) DISCOVERY

How effective are they at helping you achieve clarity before making a choice?

(M) MANAGEMENT

How effective are they at managing projects they initiate to a timely conclusion?

TRUST

Rate each advisor on a scale of 1 to 10, with 10 representing a high level of credibility, reliability, intimacy or self interest.

(C) CREDIBILITY

What is the advisor's level of professional credibility?

(R) RELIABILITY

How reliable is the advisor?

(I) INTIMACY

How comfortable are you talking with this advisor regarding private or personal matters?

(S) SELF-ORIENTATION

What is your level of concern that the advisor places his or her interests ahead of your own?

Your TEAM *Profile*

TEAM MEMBER	R	D	S	M		C	R	I	S

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