

# ADVISOR EVALUATION CHECKLIST

God has placed certain advisors in your life that have the character, competence and chemistry that will guide you every step of the way, to maximize your success and keep you feeling confident. Finding a trustworthy consultant can seem overwhelming but, the checklist below details the important questions that will help you establish a deeper understanding of prospective advisors.

**Advisor's Name:** \_\_\_\_\_

## CORE VALUES

The advisor who has conflicting core values and beliefs from you will have a difficult time truly understanding you and supporting your God given goals. List some of your own personal core values and beliefs that you are looking for in an advisor:

- Connect with the advisor on social media (Facebook, Instagram, LinkedIn etc.)
  - Mutual friends between both the advisor and I speak highly of their work.
  - Based on the advisor's actions, activities and hobbies, I see mutual interests that align with my own personal values

- Explore the advisor's website
  - The advisor is passionate about his/her work; more than a career, it is a calling
  - Advisor has unique practice model that provides me with an individualized plan that will guide me towards achieving my specific purposes and goals
  
- Google the advisor's name
  - I approve of what others are saying about the advisor
  - Articles and books the advisor has written or quoted in align with my values and reflect what I am looking for in an advisor
  
- Advisor values people over money
  
- Advisor offers services that assist me in pursuing my life goals, valuing both my personal beliefs and values
  
- The advisor's outside activities listed on the Full Detailed FINRA Broker Check Report at [brokercheck.finra.org](https://brokercheck.finra.org) is in alignment with my values

## COMPETENCY

Measuring an advisor's competency is determined by your ability to trust their advice. By thoroughly researching an advisor's background and professional experience, you can ensure they are both qualified and competent to assist you.

Advisor has no violations listed on the advisor's Full Detailed FINRA Broker Check Report at [brokercheck.finra.org](https://brokercheck.finra.org)

- Over 20 years of professional experience in financial advising
- College degree in business, finance, or accounting
- Author of financial articles and books (Google the advisor's name)
- Authored educational content that is relevant in the areas you need advising (Search advisor's website)
- Sought out advisor by authors and news media to contribute to financial articles and books (Google the advisor's name)
- Reputable organizations have reached out to the advisor to be on their Board of Trustees, elder's board, etc.
  
- Board Certified Financial Planner as verified on their website [letsmakeaplan.org](https://letsmakeaplan.org)
- Offers you access to a financial planning software like [RightCapital](https://RightCapital.com)

## CHEMISTRY:

Chemistry is not something that is found through research; it is discovered through interactions and personal connections.

- Enjoy spending time with my advisor
- Teaches in a way you enjoy and understand
- Advisor listens and understands me, my God given goals and dreams. “Pay close attention to what you hear. The closer you listen, the more understanding you will be given” (Mark 4:24, NLT)
- Advisor is extremely knowledgeable and confident, yet humble. “The greatest among you will be your servant. For those who exalt themselves will be humbled, and those who humble themselves will be exalted” (Matthew 23:11-12, NIV)
- Honored by the advisor; I look up to my advisor and my advisor looks up to me. It is mutual honor and respect. “Love each other with genuine affection, and take delight in honoring each other” (Romans 12:10, NLT)
- Advisor never patronizes me, only builds me up “So encourage each other and build each other up” (1 Thessalonians 5:11, NLT).
- I trust the advisor with my hopes, dreams, and visions. “A gossip goes around telling secrets, but those who are trustworthy can keep a confidence” (Proverbs 11:13, NLT).