



# 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 lie 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.   |   |   |   |   |   |   |   |   |   |    |  | 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 _____  |

Box 507  
Parksville, BC  
Canada V9P 2G6

Tel: 250-248-6012  
1-877-248-6012

Fax: 1-866-902-4066

e-mail: [info@leadingadvisor.com](mailto:info@leadingadvisor.com)  
[www.leadingadvisor.com](http://www.leadingadvisor.com)

