Your Advisory Team

Where do you get advice when you need it?

This helps us indentify who you value when our clients need a great recommendation.

My Team Members:	Scale of 1 to 10: 1 (blah) to 10 (amazing)	Name: Company:	Identify
Financial Advice	1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10		☐
Liability Advice	1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10		☐
Real Estate Advice	1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10		☐
Insurance Advice	1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10		☐
Accounting Advice	1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10		☐
Legal Advice	1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10		☐

Any other advisors you work with today?