

# THE LEGACY SPECTRUM



## Assessment Of Prospective Members Of Your Personal Board Of Advisors

*Use the following scale to grade candidates:*

- 0: Don't know*
- 1: Strongly Disagree*
- 2: Disagree*
- 3: Agree*
- 4: Strongly Agree*

QUALITY	CHARACTERISTIC	GRADE
Technical Competency	Advisor is technically competent in the area in which I require expertise.	0 1 2 3 4
Personal Concern	Advisor expresses genuine concern for me and my opinions through active listening.	0 1 2 3 4
Creativity	Advisor is proactive in suggesting both items for me to consider and possible solutions.	0 1 2 3 4
Timeliness	Advisor is timely in their responses to my calls and email messages.	0 1 2 3 4
Cooperation	Advisor listens to, speaks favorably of, and works well with other advisors.	0 1 2 3 4
Organizational Skills	Advisor is organized and prepared for meetings.	0 1 2 3 4
Successor Designate	Advisor has named a successor who could work, if necessary, with my surviving spouse and children.	0 1 2 3 4
Billing Practices	Advisor's billing practices are transparent and reasonable. Advisor is open to an annual retainer.	0 1 2 3 4