ADVISOR TRAINING NEEDS

SELF-ASSESSMENT

TRAINING NEEDS ASSESSMENT

Answer each question (from *Strongly Disagree* = 1 to *Strongly Agree* = 5) to assess your effectiveness in serving multigenerational family wealth. Once you answer all the questions, add up your total score and then proceed to the second page to review your assessment profile and results.

SD	D	UNDECIDED	A	SA

My firm/team has a process to identify, amongst all our client-families, which families we will intentionally invest additional time and resources, in an effort to build value-based relationships with both parents and their next generation.

1 2 3 4 5

I know which of my client-families plan on transferring their wealth to their children.

1 2 3 4 5

I have a relationship with each of the spouses (or significant others) of my client-families.

1 2 3 4 5

I have personally met a majority of the NextGens (Gen X and Millennials) in my client base.

1 2 3 4 5

My firm/team has the tools needed to help our client-families address qualitative topics such as: family values, communicating their legacy, philanthropy, family-business roles, and genograms (family trees).

1 2 3 4 5

I am confident helping my client-families navigate the "softer" issues pertaining to their wealth.

1 2 3 4 5

I know how to facilitate productive communication within my client-families and effectively manage family dynamics.

1 2 3 4 5

I have a process for designing successful multi-generational family meetings.

1 2 3 4 5

I have a great deal of experience facilitating multigenerational family meetings.

1 2 3 4 5

When it comes to working with the qualitative multigenerational planning needs of my client-families, I would like more training in the area(s) of...

YOUR ASSESSMENT RESULTS

Using the rating table (right), determine if your total score aligns with the *Silver, Gold, or Platinum* profile.

To discuss your responses or to inquire about how our Whole Family Advisor Associate Certification Program can help you with your training needs, contact Academy@legacycapitals.com or 609-917-0161 to speak with an Instructor.

Your Score

Profiles
SILVER (9-21)
GOLD (22-34)
PLATINUM (35-45)

SILVER

This result suggests that there is a great opportunity to develop your knowledge, skills and abilities related to serving the qualitative multigenerational planning needs of your client-families.

GOLD

This result suggests that there is an opportunity to develop some of the core strategies and skills required to effectively serve the qualitative multigenerational planning needs of your client-families.

PLATINUM

Congratulations! Continue to build on your strategies and skills required to serve the qualitative multigenerational planning needs of your client-familiies.

To learn more about our advisor training, follow this link to the Legacy Capitals Academy site