Professional Development
Realize Your Potential

ADVISOR PRACTICE EVALUATION FORM

INTANGIBLE VALUE PROVIDED

CONCRETE SERVICES PROVIDED

Financial Management		Asset Management		Tax Planning		Risk Management	
Mortgage & Debt Analysis		Portfolio/Pension Analysis		Tax Analysis		Life Insurance –Term/Perm	
Cash Flow Analysis		Diversified product offering		Tax Return Coordination		Critical Illness & Disability	
Cash Flow Projection		Retirement/Education/Savings		In Depth Personal Tax Planning		Long Term Care Insurance	
RRSP/Leverage Loans		Repositioning/Rebalancing		Business Tax Planning		Other	
Regular Reviews		Regular Reviews		Regular Reviews		Regular Reviews	
Retirement Planning		**Estate Planning**		**Life Transition Planning**		**Engagement Process**	
Retirement Income Analysis		Estate Planning Analysis		Eldercare Issues		Deep client discovery	
Assessment of Objectives		Wills and POA		Workplace Transitions		Client Action Plan	
Retirement Expenses Analysis		Charitable Giving		Healthy Living		Regular status reports	
Retirement Cash Flow Projection		Business Succession Planning		Referral to other professionals		Consistent communication	
Regular Reviews		Regular Reviews		Regular Reviews		Proactive problem resolution	

CLIENT SEGMENTATION

TOTAL CLIENTS	TOTAL A CLIENTS	TOTAL B CLIENTS	TOTAL C & D CLIENTS

CI Investments