

## The Life First Advisor Readiness Quiz

Take our Life First Advisor Readiness Quiz. It will help you quantify the need and value for Life Planning services in your practice.

Service that a client or prospect might need	How important is this to your client and prospects (high, medium, low)	Are you currently providing this service to them in some way? (Yes or No)	Do your clients look to you as a source of this service?	How do you communicate to the marketplace that you provide the service?
Information on lifestyle planning?				
Help or information on goal setting?				
Understanding of key life transition issues?				
Understanding the financial implications of life planning decisions?				
Access to information on non-financial, life-oriented education?				
Referrals to other non-financial professionals such as coaches, personal trainers, psychologists etc.?				
Information on career transition or other "work related" topics?				
Information on the non-financial aspects specifically associated with retirement?				