New Advisor

Practice Profile

First time callers: Please complete this profile and submit it with the *Big Case Analyzer* data form.

Name:

Firm:

Address 1:

Address 2:

State: Zip:

Phone(s):

Email(s)

Website:

I am a: ☑ Financial Advisor ☑ Lawyer ☑ Accountant ☑ Other

How long have you been in practice? Number of Years

Please describe your practice.

Are you licensed to sell life insurance? ☐ Yes ◉ No

Are you affiliated with or do have your own RIA firm? ☐ Yes ◉ No

Is it federally or state registered? ☐ Yes ◉ No Who is your broker dealer?

New Advisor
Practice Profile *(continued)*

My practice revenues are divided roughly as follows:

Ria Fees		%
Legal Fees (hourly)		%
Legal Fees (project)		%
Asset Management Fees		%
Securities Commissions		%
Insurance Commissions		%
TOTAL	0	**%**

Please rank the following by importance to you. 10 is top priority, 1 is of little importance.

Learn more about advanced strategies	
Increase my ability to engage more high net worth clients	
Increase my planning fees	
Be more effective with other advisors	
Increase commission revenues	
Increase referrals	
Increase my credibility	
Develop a sales and marketing strategy	
Increase my advanced planning skills	
Build trust with prospects faster	