

## Advisor scorecard

Use this scorecard to rank prospective advisors, giving a score of 1 for low and 3 for high on the various criteria. Add up the score at the bottom of the table for each advisor. If you weight certain criteria higher than others, be sure to take that into account, rather than simply going by the total.

<b>Statement</b>	<b>Advisor A 1 (low) to 3 (high)</b>	<b>Advisor B 1 (low) to 3 (high)</b>	<b>Advisor C 1 (low) to 3 (high)</b>
I feel comfortable with this advisor.			
I feel I can trust this advisor to put my interests first.			
I feel I can trust this advisor with my personal information.			
I feel the advisor listens to me.			
I understand and feel comfortable with the advisor's approach to investing.			
I understand how the advisor charges for service.			
The advisor has a strong educational background, good references and a clean track record.			
The advisor seems to understand my goals and my feelings about risk.			
The advisor shows an independent approach in selecting investment products.			
The advisor works with a broad range of products.			
The advisor can provide advice in the areas I need, e.g. debt management, investing, insurance, tax planning.			
<b>Total</b>			

