

THE TRUSTED ADVISOR EXERCISE
INTEGRATED ADVISORY



**LEADING CPA FIRMS UNDERSTAND
THE POWER OF INTEGRATION**

WE INTEGRATE THE FUTURE OF CLIENT NEEDS
INTO THE HISTORY OF CLIENT RELATIONSHIPS

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AS YOU HAVE EVOLVED,
SO HAS YOUR NEED FOR PROFESSIONAL ADVISORY.

From your first job to your first home, you have reached significant accomplishments and built value through relationships with your professional advisors.

Trusted Advisors - Accomplishments

Completing the scorecard: For each trusted advisor, note five (5) accomplishments you’ve reached with each.

INSURANCE BROKER



LAWYER



ACCOUNTANT



INSURANCE ADVISOR



BANKER



ACCOMPLISHMENTS	ACCOMPLISHMENTS	ACCOMPLISHMENTS	ACCOMPLISHMENTS	ACCOMPLISHMENTS