

CURRENT ADVISORY TEAM TOOL  
**INTEGRATED ADVISORY**



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

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

## CURRENT ADVISORY TEAM TOOL INTEGRATED ADVISORY

### Current Advisory Team Tool

As you have evolved, so has your need for professional advisory. The first step to an integrated advisory relationship is to define the areas in which your current advisors operate, and to create a line of sight between them.

Completing the Tool:

For each advisor, define (at a high level) the services they provide. Also, make notes as to their strengths and weakness in your mind, as well as areas in which they could improve their service to you.

#### INSURANCE BROKER



#### LAWYER



#### ACCOUNTANT



#### INVESTMENT ADVISOR



#### BANKER



SERVICES & STRENGTHS	SERVICES & STRENGTHS	SERVICES & STRENGTHS	SERVICES & STRENGTHS	SERVICES & STRENGTHS
ADDITIONAL NOTES	ADDITIONAL NOTES	ADDITIONAL NOTES	ADDITIONAL NOTES	ADDITIONAL NOTES
CONTACT	CONTACT	CONTACT	CONTACT	CONTACT