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

THE TRUSTED ADVISOR EXERCISE

INTEGRATED ADVISORY

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