🗹 REALITY CHECK

Name: Click and type

Date: Click and type

Once you’ve completed this strategy, please submit your completed Reality Check as follows:

* + - Complete this document with your answers.
    - Save a copy of your completed *Reality Check* and email it as an attachment.

Client Analysis

1. What does the 80/20 principle refer to in the context of analyzing your clients? Click and type
2. How does the Client Analysis assist you as a Financial Advisor to serve your clients? Click and type
3. If you could replicate your AAA and AA clients, what impact would it have on your annual revenue? Click and type
4. What was the most useful information you learned from conducting your Client Analysis? Click and type
5. Have you scheduled an annual review on your CRM to update your Client Analysis Worksheet? Click and type