

Coaching Self-Assessment

Instructions:

Select the answer that best applies to you. Add up your points as you go — your total score will reveal your results at the bottom of the page.

1. If you own a small business, what is the annual revenue?

- ☐ I don't own a small business (0 points)
- ☐ Less than \$500,000 (1 point)
- ☐ More than \$500,000 (2 points)

2. Is the primary purpose of your business long investment growth or lifestyle support?

- ☐ Growth (2 points)
- ☐ Lifestyle (0 points)

3. Are you considering buying or selling a business within the next 5 years?

- ☐ Yes (2 points)
- ☐ No (0 points)

4. How much do you donate to charity?

- ☐ Less than \$5,000 (0 points)
- ☐ Between \$5,000 and \$15,000 (1 point)
- ☐ More than \$15,000 (2 points)

5. Are you concerned about maximizing the tax benefits of making charitable donations?

- ☐ Yes (1 point)
- ☐ No (0 points)

6. Do you have more than \$1,000,000 in investments?

- ☐ Yes (2 points)
- ☐ No (0 points)

7. Are your investments primarily in things like real estate and small businesses?

- ☐ Yes (2 points)
- ☐ No (0 points)

8. Are you interested in estate planning and making sure your heirs are cared for?

- ☐ Yes (1 point)
- ☐ No (0 points)

9. Are you concerned about paying for elder care or nursing home costs?

- ☐ Yes (1 point)
- ☐ No (0 points)

10. Do you own guaranteed income and/or index annuities?

- ☐ Yes (2 points)
- ☐ No (0 points)

11. What is your household income?

- ☐ Less than \$350,000 (0 points)
- ☐ Between \$350,000 and \$500,000 (1 point)
- ☐ Over \$500,000 (2 points)

12. What is your age?

- ☐ Under 40 (0 points)
- ☐ Between 40 and 60 (1 point)
- ☐ Over 60 (2 points)

13. Do you have stock options?

- ☐ Yes (2 points)
- ☐ No (0 points)

14. How do you manage investments?

- ☐ I select investments myself (1 point)
- ☐ I work with an advisor (2 points)
- ☐ I don't have any investments (0 points)

Score Interpretation

0–4: Basic — You may not need you may not need Premium Coaching right now, but there's value in exploring foundational strategies.

5–8: You would likely benefit from Premium Coaching. You have elements in place, but structured guidance could unlock greater growth and protection.

9+: You need Premium Coaching. You're managing complex assets or planning — personalized support can make a meaningful difference.