Advisor Diagnostic Questions

Use this questionnaire to determine if you have relationships potentially at risk.

☐ Do you understand the different life-stages of your clients (Suddenly Single, Married Breadwinner, Married Contributor, Single Breadwinner) and are you tailoring your service to those needs?

☐ Do you have female clients, especially those who are married/have partners, who you have not spoken with during the last year?

☐ Do you find that female clients leave your practice after they become widowed or divorced?

☐ Are your Single Breadwinners actively referring her children and extended family to you?

☐ Are you generating referrals from your largest female clients?

☐ Do you have female clients who used to refer potential new clients, but no longer do?

☐ Do you have female clients who routinely cancel meetings/calls with you?

☐ Are you regularly sharing educational content with your female clients?

☐ Are you connected on social media with your female clients, where appropriate?

☐ Are you hosting educational events for female clients and their children?
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