

EVA WEALTH  
Smart Money. Strong Women



# Adviser Scorecard- Your Comparison Tool

# Adviser Scorecard



To help with your decision making, we recommend scoring prospective Advisers on a scale ranging from 1-5

(1 where the answer/evidence is not satisfactory, 5 where the answer/evidence is extremely compelling) and highlighting topics of concern with an exclamation mark (!).

This is useful when comparing different service providers but first you need to understand what's most important to you and your business. It's up to you to decide where you require

higher scores and what your lowest acceptable scores are on various questions. Any areas that concern you may need further investigation or result in automatic exclusion.

For sample questions to ask prospective advisers see our free helpful Questions to Ask Prospective Advisers booklet.

Area	Company 1	Company 2	Company 3	Area of Concern
<b>EXPERIENCE TO DATE</b>	Score 1-5	Score 1-5	Score 1-5	
First Impressions General response times (to emails calls etc)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Attention to detail	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Client care to date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Professionalism	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Area	Company 1	Company 2	Company 3	Area of Concern
<b>COMPANY BACKGROUND</b>	Score 1-5	Score 1-5	Score 1-5	
Firm's mission & values	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Ownership structure	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Business Plan/Exit plans	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Investment philosophy/approach	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Capacity to take on new work	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Area	Company 1	Company 2	Company 3	Area of Concern
<b>TEAM &amp; QUALIFICATIONS</b>	Score 1-5	Score 1-5	Score 1-5	
Number of employees	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Adviser qualifications	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Team's qualifications	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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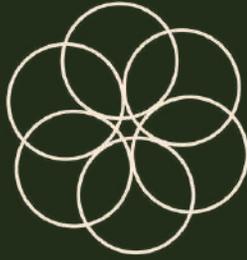
Area	Company 1	Company 2	Company 3	Area of Concern
	Score 1-5	Score 1-5	Score 1-5	
REGULATORY				
Regulatory status				
Conflicts of interest (if any)				

SERVICES OFFERED	Company 1	Company 2	Company 3	Area of Concern
	Score 1-5	Score 1-5	Score 1-5	
Meet my needs				
Access to Adviser throughout the year				
Dedicated team or Account				
Manager Service-Level				
Agreement Mobile access to files				
Pricing				

OTHER	Company 1	Company 2	Company 3	Area of Concern
	Score 1-5	Score 1-5	Score 1-5	

CLIENT FEEDBACK	Company 1	Company 2	Company 3	Area of Concern
	Score 1-5	Score 1-5	Score 1-5	
Client 1				
Client 2				
Client 3				

TOTAL	Company 1	Company 2	Company 3



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