

## **Self-Analyze (Key to Advancement)**

Please scan (or save) completed form and email back to [customercare@ucloudps.com](mailto:customercare@ucloudps.com)

**Advisor Name:** \_\_\_\_\_

**Licensing Information: (Check All That Apply):** I am a...

65/RIA/IAR

CPA/EA/Accountant

6/7/FINRA

Insurance Producer

Other: \_\_\_\_\_

The area I am strongest: \_\_\_\_\_

The area I am weakest: \_\_\_\_\_

Yes  No Is selling for you hunt & peck or a true process?

How do you market?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Rate your knowledge on each subject on a scale of 1-10, 10 being the best!**

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Income Tax Code

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Stocks & Bonds

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Exchange Traded Funds

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Variable Annuities

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Living Trusts

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Charitable Lead/Remainder Trusts

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Fixed Annuities

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Fixed Indexed Annuities

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Single Premium Immediate Annuities

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. LTCI/Annuities

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Long-Term Care

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Life Insurance

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Universal Life

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Equity Indexed Life

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Reverse Mortgages

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Managed Mortgage Funds

**Legal Structure:** I am/have...

- Yes  No Incorporated, LLC, or Other: \_\_\_\_\_
- Yes  No Trademarked Business Name
- Yes  No In-Force E&O Insurance
- Yes  No Past Acts Coverage Included in E&O
- Yes  No Written Privacy Policy
- Yes  No Written Income Tax Disclosure Forms

**Please answer as completely as possible:**

Name of financial planning software: \_\_\_\_\_

Primary use:

- Live Discussions  Printed Reports  Other: \_\_\_\_\_

Likes/Dislikes of planning software: \_\_\_\_\_

- Yes  No Software/Client (CRM): \_\_\_\_\_

- Yes  No Computer backup (on/off site?): \_\_\_\_\_

- Yes  No Secretary

- Yes  No Answering service

- Yes  No Additional staff

- Yes  No I work only from my home office

**Networking:** I work with a/an...

- Yes  No Attorney

- Yes  No Tax preparer

- Yes  No Mortgage lender

- Yes  No Registered stock broker

- Yes  No Health ins specialist

- Yes  No TPA/Independent custodian

- Yes  No Property/Casual ins agent

**Marketing Tools:** I have a/an...

- Yes  No Logo

- Yes  No Newsletter

- Yes  No Mission statement

- Yes  No Proposal portfolios/PDF

- Yes  No Credibility brochures/PDF

- Yes  No Published author

- Yes  No Brochure of services/PDF

- Yes  No Radio advertisement
- Yes  No Sign in/on business window, lawn, etc.
- Yes  No Advertisements/TV/Social Media/Other
- Yes  No Attractive/Vanity phone number (toll-free)
- Yes  No Supporting a local organization or sports team
- Yes  No Named plaza or building

**Website& Social Media:** I am/have...

- Yes  No A website: \_\_\_\_\_
- Yes  No Site is mobile optimized (Navigates differently than PC version)
- Yes  No Shows up on top of search engine results (without having to scroll)
- Yes  No Simple design (not complicated to navigate)
- Yes  No Video on home page
- Yes  No Made search engine listing/optimization (SEO) effort
- Yes  No Hired SEO company: \_\_\_\_\_
- Yes  No I know what keywords are in website marketing

(If yes) mine are: \_\_\_\_\_  
 \_\_\_\_\_

- Yes  No Use Google keyword planner
- Yes  No Made my URL keyword rich

(if applicable) URL forwards to: \_\_\_\_\_

- Yes  No Niching keywords - Keyword density: \_\_\_\_\_ % of website
- Yes  No Joined local Chamber of Commerce to help obtain higher Google ranking

Other steps taken to enhance rating: \_\_\_\_\_

- Yes  No Have a business YouTube Channel
- Yes  No Have a Facebook page for my business (not personal)
- Yes  No Have a business Twitter account
- Yes  No Use automation with Twitter
- Yes  No Have a business LinkedIn account
- Yes  No Maintain a blog
- Yes  No Blog pushes to social media automatically

Maximum response time to contact requests made through web site/social media:

- 24 hours  12 hours  6 hours  1 hour  30 minutes

- Yes  No Direct my clients in how to review me online
- Yes  No Aware of duplicate listing crackdown by Google
- Yes  No Aware of Google AdWords/Pay-Per-Click
- Yes  No Email/cell capture on website
- Yes  No Have an email and/or text blasting system
- Yes  No Have a CRM driven auto-responder
- Yes  No If not, I have a manually driven (or partially auto) response system

Describe: \_\_\_\_\_

- Yes  No Use Google Analytics
- Yes  No Know my cost per lead

Anything else you would like to share about yourself and your marketing activities:

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