Institute for Preparing Heirs™

Advisor Checklist

	Statement	Yes/No
1.	I am aware of research that indicates 70% of estates *fail to transfer* successfully to the next generation	
2.	I am aware that *90+% of heirs promptly change advisors* upon receiving their inheritance	
3.	I am aware that my best client families are more concerned about the *effect* wealth will have on their children rather than the *amount* of wealth that will be transferred	
4.	I have met my best clients *entire family*: grandparents, parents, children, grandchildren, and their spouses	
5.	I am comfortable *starting the conversation* about family dynamics and wealth transfer with my clients and prospective clients	
6.	I know how to *assess the wealth transition risks* for my best client families	
7.	My network of *professional advisors regularly refer* their high-net-worth families who are planning their wealth transfer	
8.	I currently have in place a process and marketing tools to *increase the number of successful families* I have as clients	
9.	I have *a business plan for my practice* that focuses on engaging and retaining heir families	
10.	I am familiar with “best practices” for family coaching and *know the proper resources to refer*	

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