

INSTRUCTIONS

Find out how female-friendly your practice is by marking the following statements “True” or “False”. Mark your responses according to your current practice, not based on what you think is the right answer. At the end, find out how to score this assessment to reveal your female-friendly quotient (FFQ).

TRUE FALSE

1	My practice is at a minimum equally weighted in terms of female versus male clients. (Only include clients you are actively working with either individually or as a member of a couple.)	T	F
2	Women face a variety of financial hurdles that are different than what men face.	T	F
3	When I meet with prospects, I need to know if they are going to sign up for my services within the first two appointments; otherwise I am wasting my time.	T	F
4	I offer educational forums and client events specifically for women.	T	F
5	When I communicate with my female clients, I find it important to stress my expertise so that they feel comfortable working with me.	T	F
6	All women prefer to work with female advisors; therefore, I refer most women clients to my female colleagues.	T	F
7	When I am advising a couple, I communicate with the partner who speaks up the most.	T	F
8	I adjust my communication style to meet the preferred style of my client.	T	F
9	When I am meeting the couple, I check in with both partners each time I have a question.	T	F
10	I offer individual meetings for my female clients who are members of a couple.	T	F
11	I communicate with each member of a client’s financial team, such as their accountant, banker, and estate attorney, regularly.	T	F
12	If a female client is not talking, she is not learning.	T	F
13	During a client annual review, I spend a fair amount of time talking about investment performance relative to benchmarks such as the S&P.	T	F
14	I find it important to tie investment performance results to real-life events for my female clients.	T	F
15	When I develop a financial plan, I make sure the client articulates clearly her family values, life goals, and wishes for the next generation.	T	F
16	I offer intergenerational wealth services as part of my practice.	T	F
17	I avoid talking about emotional issues related to money with my clients.	T	F

- | | | TRUE | FALSE |
|-----------|--|------|-------|
| 18 | I am open to working with family wealth consultants, family therapists, and other consultants to help my female clients manage and pass on their wealth. | T | F |
| 19 | I do not offer financial literacy resources or training to my clients as I don't see this as part of my job. | T | F |
| 20 | The majority of women view wealth the same as men. | T | F |

YOUR SCORE

Give yourself 2 points for each of the following answers and then add up the total points to find out your FFQ.

1	TRUE	6	FALSE	11	TRUE	16	TRUE
2	TRUE	7	FALSE	12	FALSE	17	FALSE
3	FALSE	8	TRUE	13	FALSE	18	TRUE
4	TRUE	9	TRUE	14	TRUE	19	FALSE
5	FALSE	10	TRUE	15	TRUE	20	FALSE

FFQ RANGE

- 36-40 Points Congratulations! You are a very female-friendly advisor.
- 22-34 Points Nice job. You are well on your way to being a female-friendly advisor but can still pick up a few tips.
- 0-20 Points You have some work to do, but you can raise your FFQ. Reading *How to Give Financial Advice to Women* and completing the coaching exercises at the end of each chapter will help.