

Rating Your Advisory Team

Example Questions to Ask potential members of your advisory team.

Advisor's Name and Title:

A scale of 1-5 with 1 being low, and 5 high.	1	2	3	4	5
Experience working with this scenario?	~o	~o	~o	~o	~o
Can the advisor provide references from other farms or businesses they have worked with?	~o	~o	~o	~o	~
How long have they been working in this field?	~o	~o	~o	~o	~o
What professional credentials do they hold?	~o	~o	~o	~o	~o
How long would it take to complete the process?	~o	~o	~o	~o	~o
Do they have any samples/example plans used with other clients that can be reviewed?	~o	~o	~o	~o	~o
Can you please provide a clear breakdown of your fee structure?	~o	~o	~o	~o	~o
What is your comfort level working with this person?	~o	~o	~o	~o	~o
How would you rate your family members working well with this person after you are gone?	~o	~o	~o	~o	~

