

HARBOUR ADVISOR COMPATIBILITY ASSESSMENT

CURRENTLY WORKING TOGETHER

COMPARISON CHART



CATEGORY	QUESTION	YES (+)	NO (-)	POINTS
Client Services	1. They have the expertise and skill necessary to service our largest and most complex relationships.	3	-3	
	2. They consistently offer new ideas about how we can service clients better.	1	-1	
	3. They repeatedly earn compliments from our existing clients.	1	-1	
	4. They always create high-quality connections with clients and are rarely rejected.	1	-1	
Leadership	5. They are passionate about managing the people on our team.	3	-3	
	6. They have experience managing employees and making decisions.	1	-1	
	7. They are respected by colleagues and frequently sought for mentoring.	1	-1	
	8. Do they effectively lead and inspire others to achieve organizational goals?	1	-1	
Business Development	9. They are capable of developing new relationships with clients.	3	-3	
	10. They frequently create content for marketing to raise the firm's profile.	1	-1	
	11. They take steps to connect with the firms target market and actively build it.	1	-1	
	12. They often receive referrals from existing clients.	1	-1	
Ownership	13. They are willing to borrow to purchase equity in the firm.	3	-3	
	14. They understand the financials of the firm and profit and loss decisions.	1	-1	
	15. They treat the firm's finances with the same care and discipline as I would.	1	-1	
	16. They are willing to forgo immediate personal gain to grow the firm.	1	-1	
Character	17. They're someone I would trust to manage my family's affairs if I were gone.	3	-3	
	18. They always behave in ways consistent with the values of my firm.	1	-1	
	19. They have never had their integrity, ethics, or behavior questioned by my team.	1	-1	
	20. They are highly regarded in our community as active and contributing members.	1	-1	
Total				

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INTERPRETATION OF RESULTS

25 TO 30 POINTS

Your successor is highly prepared, demonstrating strong alignment with client service, leadership, business development, ownership, and character requirements. They are ready to take on leadership effectively.

20 TO 24 POINTS

A solid candidate with evident potential. They may need additional growth or alignment in specific areas to ensure readiness.

15 TO 19 POINTS

The candidate shows potential but requires significant development in several areas. Consider a structured development plan to address these gaps.

BELOW 15 POINTS

The candidate is not ready to succeed at this time. Evaluate other candidates or invest in long-term development efforts.