

Defining Your Role at Implementation

In order to best communicate what you do to a business owner; you must first define what your role will be in their lives. There are many areas of need for a business owner and you are not expected to fulfill all of them. Take a few moments to complete the table below to begin identifying your role.

In the chart below there are several services listed. First, go through each service and determine who will perform that service for the owner – you can choose:

- You: mark this box if you will perform the particular service in engagements with business owners
- Internal Partner: mark this box if you have someone within your firm that you will refer in to perform this service
- External Partner: mark this box if you have someone outside of your firm that you will refer in to perform this service

Next, complete the details section to better describe how that service will be delivered (this can be brief, it is just meant to get you thinking)

- For services you marked “You”, very briefly describe this service as you provide it
- For services you marked as Internal / External Partner, identify who you have in mind. Mark N/A if you do not have anyone yet.

Role	Performed By:			Details
	You	Internal Partner	External Partner	
Personal Financial Planning				
Insurance				
Wealth Management				
Qualified Plans / Benefits				
Succession Planning				
Business Consulting				

