Financial Advisor Coach Vetting Checklist

A side by side scorecard for choosing a business coach for your advisory practice.

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How to Use This Template

Make a copy of this document (File, then Make a copy), then score each coach you are considering from 1 to 5 on every row of the table. The rows come from what separates a coach who moves the needle from one who runs pleasant calls. Anything scoring below 3 on the first four rows is worth a hard second look before you sign.

Start Here: What Are You Actually Trying to Fix?

The specific problem (stalled growth, capacity, team, succession, or burnout):

____

What would have to change in 12 months for this to be worth the money: ________________

How you will measure that (revenue, margin, retention, or hours worked): ________________

The Five Things Worth Checking

Advisory specialization: do they understand advisory economics, or is this generic business coaching with your job title pasted on?
Repeatable framework: can they describe their process, or is it ad hoc advice on each call?
Accountability between sessions: what actually happens in the three weeks you are not on a call?
Measurable outcomes: are results tied to numbers, or to how the session felt?
Stage fit: have they worked with practices at your size and structure, or only much larger or much smaller ones?

Red Flags

Coaching is the only thing they have ever sold, with no other track record in the industry.
A free consultation with no screening or application of any kind.
More emphasis on the client experience than on measurable outcomes.
No specialization in financial services specifically.
Anything that gave you pause on the call: _______________

Cost and Commitment

Total first year cost, including any upfront fee: _______________
Minimum contract length: _______________
What happens if you want out early: _______________
References you spoke to, and what they told you: _______________

Questions to Ask on the Call

Walk me through what months one, three, and six look like.

What does a client who fails with you have in common?

Which of my numbers would you expect to move first, and by when?

Who else at my stage are you working with right now?

Notes: _______________

What to Score (1 to 5)	Coach 1	Coach 2	Coach 3
Advisory specialization			
Repeatable framework			
Accountability between sessions			
Measurable outcomes tied to numbers			
Stage fit with your practice			
Cost fits your budget			
References checked out			
Overall gut check			
Total			