COREobstacles Report | WORKSHEET

Making the most of your discussion on roadblocks to effective wealth transfer.

The COREobstacles report shares a couple's response to questions addressing the roadblocks of regret, paralysis, and worry. With scores ranging between 4 and 20, higher numbers indicate a greater level of concern.

As you prepare to review the report with your client, be sure to remind them that these obstacles are both normal and addressable. It is common for a variety of scores, both high and low. Scores are not intended for comparison, but rather to help spot potential roadblocks with the goal of addressing these areas with the appropriate tools. Addressing obstacles = addressing the root problem, rather than managing the symptoms.

Next, note areas of similarity and difference between the couple's responses. Consider questions like:

- You both have low scores for the section on regret.
    - How have you worked through mistakes from the past in ways that help you avoid regret and not feel stuck?

- I notice you have quite different scores for the section on paralysis.
    - {High Score Respondent}, can you share what is leading you to feel a bit paralyzed in your financial decisions?
    - {Low Score Respondent}, this is less of a concern for you. What thoughts help you to reduce feeling paralyzed? What tools might help your partner feel more confident in this area?

- I notice you both have high scores for the section on worry.
    - What things are "keeping you up at night?"
    - Do you have similar concerns?
    - How might you address them together?

Refer your clients to the explanation pages in the COREobstacles Report. Reviewing the timeline, manifestation, example, and result of each obstacle may help promote discussion and understanding.

Each explanation page includes a section addressing ways to reduce obstacles. That advice, plus tools from your COREobstacles Resource List, can be offered to your clients.

Finally, discuss the purpose of the report: wealth transfer freedom that involves transcendent and relational outcomes.

See the worksheet on the next page!

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Discussion with _____ _____ **Date:** _____

Areas of similarity to highlight:

_____

_____

_____

_____

Areas of difference to highlight:

_____

_____

_____

_____

What strengths does each member of the couple have in these areas?

_____

_____

_____

_____

_____

In what areas might they need tools or assistance? How can you guide them to those tools?

Notes from the meeting: