Hello, and thanks for taking the time to review this questionnaire. The purpose of this document is to act as a starting point to a conversation about where things are going well, and where there are opportunities for improvement. Please rate each of these areas on a scale of 1 to 3, with 1 being “This happens rarely”, and 3 being “This frequently happens.”

If you wish, you may want to write notes corresponding with each rating. I really look forward to the conversation, and please don’t hesitate to reach out if you have questions!

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| **Statement** | **Rating (1-3)** | **Notes** |
| 1. If mistakes are made, they are openly addressed in meetings. |  |  |
| 2. I feel comfortable discussing my personal history and life with my advisor. |  |  |
| 3. I feel like I can bring all of my issues and ideas to the table in meetings. |  |  |
| 4. During meetings, the most important – and difficult – issues are put on the table to be resolved. |  |  |
| 5. Meetings are compelling, not boring. |  |  |
| 6. Before deciding on action items based on issues, all (or most) reservations and questions are aired and addressed. |  |  |
| 7. Meetings end with clear, specific resolutions and next steps for implementation. |  |  |
| 8. I feel comfortable voicing questions, reservations, and disagreements in meetings. |  |  |
| 9. My advisor and I both address when commitments from our previous meetings are missed. |  |  |
| 10. I feel that my advisor understands my financial goals and priorities. |  |  |
| 11. When I leave meetings, I understand who is responsible for doing what action items, and why they matter. |  |  |