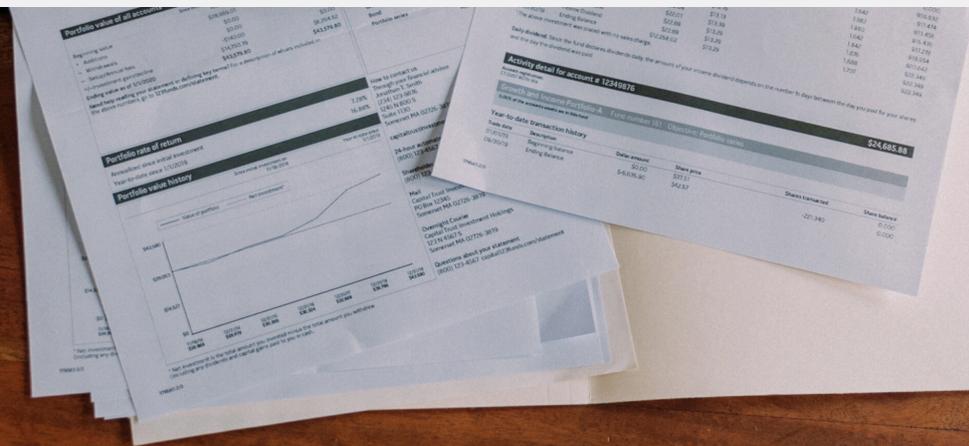


# POST INTERVIEW ASSESSMENT

PLAN YOUR RETIREMENT



**VOCARE**  
WEALTH ADVISORS

# INSTRUCTIONS

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Use this questionnaire within 15-30 minutes after the meeting. Answer each question honestly. Don't debate yourself. Rank advisors by score, not charisma.

## Scoring:

- Yes / Strongly Agree = 10 points
- Somewhat / Mixed = 5 points
- No / Disagree = 0 points

## QUESTIONS

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### 1. Clarity \_\_\_\_\_

Did I leave the meeting with *more clarity* than when I walked in?  
(Concepts felt simpler, not more complicated.)

### 2. Education vs. Sales \_\_\_\_\_

Did I feel educated rather than sold to?  
(No urgency, no pressure, no "this is what everyone does.")

### 3. Options & Trade-Offs \_\_\_\_\_

Did they clearly explain multiple viable paths and the trade-offs of each?  
(Not just their preferred solution.)

### 4. Incentive Transparency \_\_\_\_\_

Did they proactively explain how they're paid and where conflicts could exist?  
(Without me having to corner them.)

### 5. Fiduciary Behavior (not just the word) \_\_\_\_\_

Did their answers and behavior *match* what a fiduciary should do—leaving options open, naming downsides, and slowing decisions?

### 6. Decision Process \_\_\_\_\_

Do they have a clear, repeatable process for making recommendations and reviewing decisions over time?

### **7. Stress-Test Confidence \_\_\_\_\_**

Do I trust this person to stay disciplined and calm during a major market downturn or personal crisis?

### **8. Judgment & Experience \_\_\_\_\_**

Did they demonstrate good judgment—pattern recognition, nuance, and lessons learned from experience? Do they already work with a client base that has similar challenges?

### **9. Self-Awareness \_\_\_\_\_**

Were they able to articulate mistakes, limitations, or situations where they are *not* the best fit?

### **10. Client Fit Selectivity \_\_\_\_\_**

Did it feel like they were evaluating *me* as much as I was evaluating them? (Not trying to win me at all costs.)

### **11. Relationship Feel \_\_\_\_\_**

Did I feel listened to, respected, and unrushed?

### **12. Referral Test \_\_\_\_\_**

Would I confidently refer this advisor to someone I care about?

## TOTAL SCORE INTERPRETATION

### **100–120 → Finalist**

- Strong alignment. Proceed to reference checks or a second meeting

### **75–99 → Conditional**

- Technically capable, but something is off. Compare directly against higher scorers

### **<75 → Eliminate**

- Even if they're "nice" or "impressive"

This guide was designed to help you evaluate advisors objectively—not based on charisma, promises, or pressure.

If you are interviewing multiple advisors and want help interpreting what you're hearing, identifying blind spots, or understanding trade-offs that weren't explained, Vocare can help.

We regularly serve as a sounding board and second opinion for people who want to make the right decision, not the fastest one.

At Vocare, our role is not to sell products or rush decisions. We help people approaching retirement gain clarity around retirement income, taxes, healthcare, investment risk, estate planning, and timing—so they can make decisions confidently, not reactively.

If you'd like a second opinion on your situation or want to understand whether you're truly on track to retire when you think you are, we offer a complimentary initial conversation designed to bring clarity, not pressure.

We want you to *Retire With Purpose!*

The Vocare Wealth Advisors Team

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