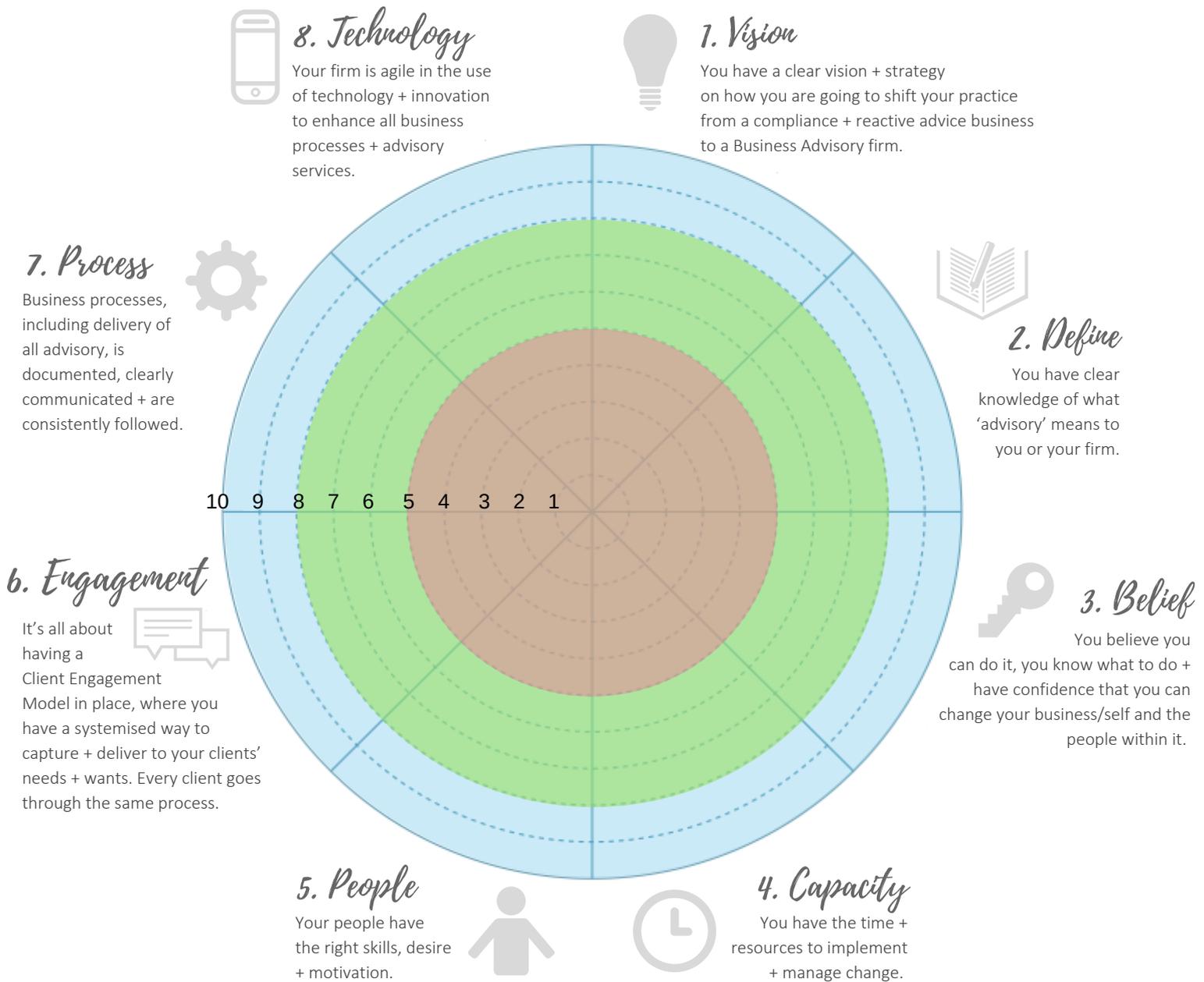


BUSINESS ADVISORY CAPABILITY WHEEL

The purpose of this exercise is to get a snapshot of where your firm ranks to become an 'advisory' firm.

Plot your scores out of ten for each of the capability elements. Refer to the scoring definitions at the bottom of this page.



0 SCORE

Either no idea or not applicable at this stage.

1-5 SCORE

Advisory of any kind is ad-hoc + reactive. Scale for your core compliance business.

5-8 SCORE

Your core business is exceptional, you are growing in the advice space + are ready to accelerate.

8-10 SCORE

You are a holistic advice base firm.