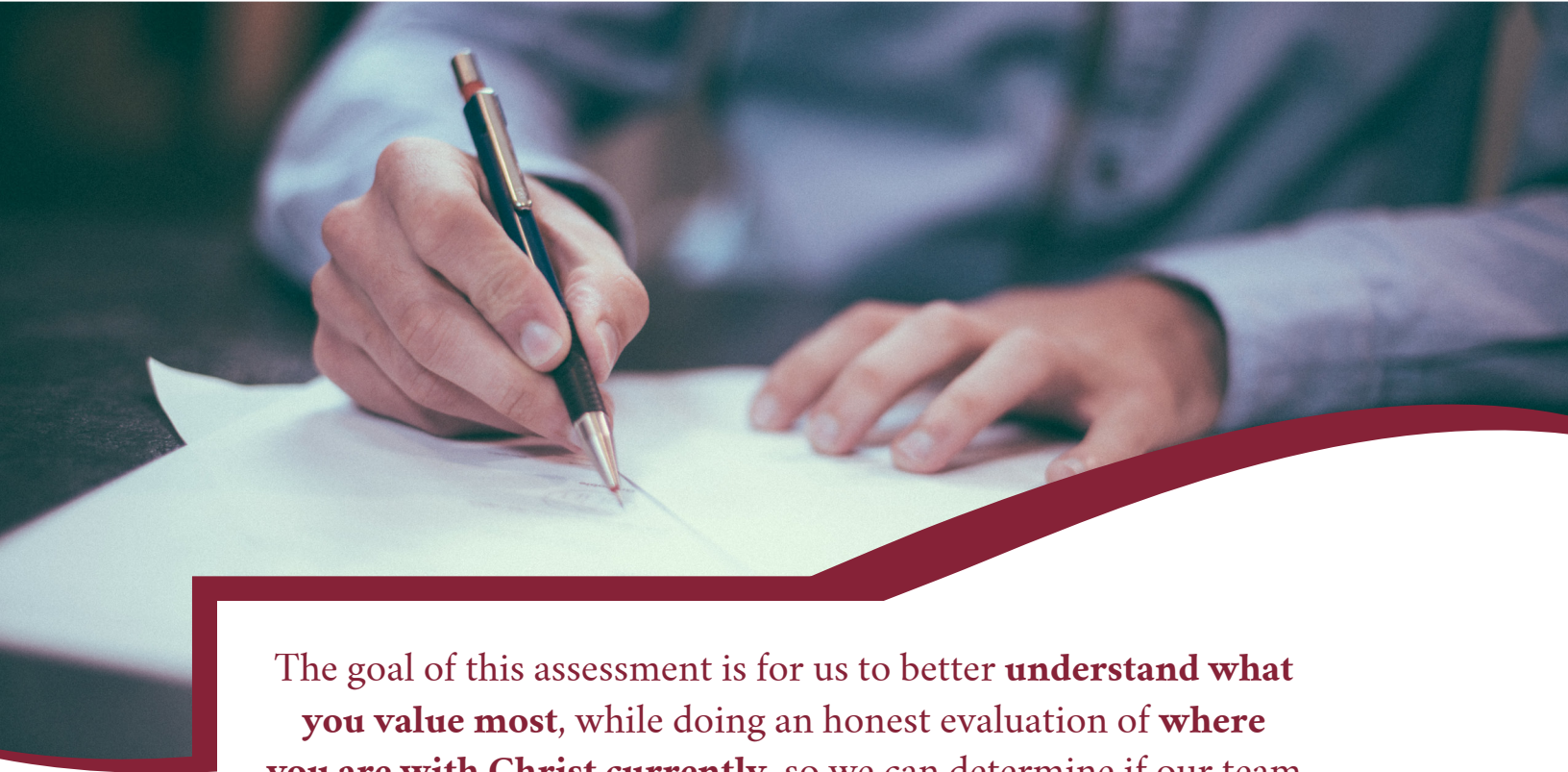


Stewardship Coaching Qualification Assessment



The goal of this assessment is for us to better **understand what you value most**, while doing an honest evaluation of **where you are with Christ currently**, so we can determine if our team of advisors and stewardship coaches can **better serve you** and support you as you **walk forward for God's glory**.



We find that many of our financial planning and wealth management clients who have enjoyed working with us over the years, simply desire a greater support in the area of putting their faith into purposeful action, while growing as disciples and stewards of God's kingdom. We work in synergistic relationship with the business and life coaches of Live with Purpose Coaching, LLC. to help propel you into the abundant life that Christ desires for each of us.

Name:

Date:

Company:

Stewardship Coaching
Qualification Assessment
A Tool Developed by:





1. I have a clearly articulated life mission statement in place.

(10 yes in writing)

1 2 3 4 5 6 7 8 9 10
strongly disagree strongly agree

2. How well do you feel like you are stewarding the wealth God has given you?

(10 best)

1 2 3 4 5 6 7 8 9 10
strongly disagree strongly agree

3. How clear are you on how to walk out your calling (mission) that you or your family has?

(10 very clear)

1 2 3 4 5 6 7 8 9 10
strongly disagree strongly agree

4. You view work as part of your calling and go to work for the Lord each day?

(10 if most days)

1 2 3 4 5 6 7 8 9 10
strongly disagree strongly agree

5. I have a plan to live a generous life.

(10 if excelling)

1 2 3 4 5 6 7 8 9 10
strongly disagree strongly agree

6. I am holding nothing back to use for the Lord (relationships, money, possessions, and talents).

(10 holding nothing back)

1 2 3 4 5 6 7 8 9 10
strongly disagree strongly agree

7. I am making disciples in my life.

(10 for very active)

1 2 3 4 5 6 7 8 9 10
strongly disagree strongly agree



8. I desire to use all God has given me to be a faithful steward.

(10 very important)

1 2 3 4 5 6 7 8 9 10
strongly disagree strongly agree

9. I have a basic financial plan in place.

(10 if a written plan in place)

1 2 3 4 5 6 7 8 9 10
strongly disagree strongly agree

10. I believe it is important to live intentionally in all areas of life and also important to have balance and margin in my week.

(10 very important)

1 2 3 4 5 6 7 8 9 10
strongly disagree strongly agree

TOTAL:

SCORING ASSESSMENT *(How well do I qualify?)*

- If you are married and have five or more questions that have a marital differential of 3 or more
- You are a solid candidate for this program if you scored under 75
- You are highly recommended to immediately begin the program if you are under 50

What sort of options and investments are involved in Bare Wealth Advisors Stewardship Coaching Services?

- 1. Typical Program*** - We conduct a quarterly meeting with you and ask for a two year commitment in working through appropriate tools based on the intake consultation. The financial investment is \$1500 per year.
- 2. Accelerated Program*** - We conduct monthly meetings and have a one year commitment. The financial investment for this accelerated program is \$4,000 per year.

Contact Bare Wealth Advisors
www.BareWealthAdvisors.com
(717) 407 5200
info@BareWealthAdvisors.com

* Must have done a financial plan with Bare Wealth to qualify to begin stewardship coaching program.

Seating for this program is limited.