

Declan Stovall - Initial Behavioral Assessment

(716) 555-0126

Advisor Quick Brief™

If you only read one thing before this meeting...

ADVISOR CONFIDENCE SCORE

70 / 100



The score reflects a balanced assessment across foundation, planning, and relationship categories, indicating a steady approach to financial decision-making.

MEETING FOCUS

The primary objective is to review the current financial foundation and ensure alignment between his moderate planning scores and his long-term objectives.

MEETING STYLE

Collaborative

Prioritize a two-way dialogue that invites his input on plan adjustments to honor his established role as a steady planner.

MEETING PREPARATION

- Declan Stovall displays a consistent and stable approach to financial planning with a balanced profile across planning, foundation, and relationship metrics.
- Avoid rushing into high-level strategic changes without first validating the client's current comfort level with their existing foundation.
- Inquire about which specific aspects of the planning process currently provide him with the most assurance and where he sees potential for refinement.

Executive Summary

Steady planner with strong foundation and moderate retirement readiness confidence.

OVERALL SCORE

70 /100

ASSESSMENT DATE

Feb 10, 2026

STABLE

BEHAVIORAL

68

RELATIONSHIP

74

FINANCIAL STABILITY

72

PLANNING

65

Score Trend Over Time

Behavioral & Financial Stability scores from initial baseline through latest Life Update



CHART KEY

- Behavioral
- - - Financial Stability