

*This checklist is designed to assess the alignment between your situation and the unique characteristics of a REF-led peer group. Evaluate each characteristic, considering your present circumstances, to determine the value for you of membership.*

UNIQUE CHARACTERISTIC	BENEFICIAL ELEMENTS	PERCEIVED VALUE FOR YOU
SAFE HAVEN	<b>FIND A TRUSTED PLACE TO AIR YOUR THOUGHTS</b> <ul style="list-style-type: none"> <li>Confidential setting</li> <li>No competitors in the room</li> <li>“All for one, one for all” atmosphere</li> </ul>	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low
REAL FEEDBACK	<b>FIND ADVISORS WILLING AND ABLE TO GIVE UNBIASED INPUT</b> <ul style="list-style-type: none"> <li>Not financially or emotionally indebted to you</li> <li>No hidden agendas</li> <li>Honest, unfiltered advice</li> </ul>	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low
GUIDANCE	<b>FIND YOUR WAY</b> <ul style="list-style-type: none"> <li>Trusted “Business Sherpa’s” take you to new heights</li> <li>Tap into a diversity of business experiences</li> <li>Learn from others who’ve “been there” and “done that”</li> </ul>	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low
SOLID REASONING	<b>WISH YOU COULD BRAINSTORM WITH YOUR PEERS</b> <ul style="list-style-type: none"> <li>Proven structured process</li> <li>Real-world business advisors</li> <li>Fresh set of eyes</li> </ul>	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low
INSURANCE	<b>WISH TO RUN YOUR IDEAS BY OTHERS</b> <ul style="list-style-type: none"> <li>Avoid others’ mistakes</li> <li>Hedge your bets</li> <li>Eliminate hit or miss approach</li> </ul>	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low
MOTIVATION	<b>NEED TO FIND A WAY TO BE ALL YOU CAN BE</b> <ul style="list-style-type: none"> <li>Learn from others</li> <li>Become accountable to someone other than yourself</li> <li>Worn ON the business not IN the business</li> </ul>	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low
ILLUMINATION	<b>NEED TO BRING TO LIGHT NEW IDEAS</b> <ul style="list-style-type: none"> <li>Expand your field of vision</li> <li>Expose what you don’t know you don’t know</li> <li>Bring to light new perspectives and alter your set point</li> </ul>	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low
MAGNIFICATION	<b>NEED TO DEVELOP A DEEPER LEVEL OF UNDERSTANDING</b> <ul style="list-style-type: none"> <li>Reveal unseen details</li> <li>Challenge your assumptions</li> <li>Magnify your thinking by the “Power of 10”</li> </ul>	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low
MOLECULAR	<b>NEED TO ALTER YOUR BUSINESS DNA</b> <ul style="list-style-type: none"> <li>Develop greater self awareness</li> <li>Create collaborative “Master Mind”</li> <li>Provide a catalyst for change</li> </ul>	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low
EXPLOSIVE	<b>NEED TO RELEASE YOUR FIRM’S LATENT POTENTIAL</b> <ul style="list-style-type: none"> <li>Achieve escape velocity from current business trajectory</li> <li>Propel your business to the next level</li> <li>Start a chain reaction of ideas</li> </ul>	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low