

	Maximum	Minimum	Percent
1 100% completion of client review meetings/year	20	19	95%
2 100% completion of FEPA I/FEPA II meetings/year	15	12	80%
3 100% completion of new client portfolio implementation	12	12	100%
4 100% completion of financial independence planning	10	9	90%
5 100% completion of personal MBOs.	21	16	76%
6 Personal leadership attributes	15	12	80%
7 Develops goals for team members: MBO and advancement	17	14	82%
8 All team members hit training targets.	10	9	90%
9 All team members hit advancement/MBO targets.	10	8	80%
10 Satisfied clients. None leave firm.	20	19	95%
11 15 qualified referrals from clients/year.	15	8	53%
12 100% tax return completion on time.	18	16	89%
13 100% approval of tax returns by tax manager.	15	12	80%
14 Contributes to new client service offerings.	10	5	50%
15 Contributes to investment committee meetings	5	4	80%
16 Conducts team members performance reviews	5	5	100%
17 Develops/reviews team training materials.	5	3	60%
18 FPA NCA meeting participation	4	3	75%
19 FPA NCA board service	4	1	25%
20 FPA training.	3	3	100%
21 Outside training.	3	2	67%
22 Assigned reading.	3	2	67%
23 Interviews/screens new CFP hires.	2	2	100%
Totals	242	196	81%