

Table 1: FPEQ Scorecard

Open-Ended Questions				
Low			High	
1	2	3	4	5
Adviser only asks closed-ended questions.	Most questions are closed-ended. Adviser asks a few open-ended questions, but the questions are complex (e.g., double/triple barrel questions).	Adviser often asks open-ended questions, but misses some opportunities to do so, or the questions are sometimes complex (approximately 50% of questions are open-ended).	Adviser consistently asks open-ended questions (approximately 60% of questions are open-ended).	Adviser consistently asks simple, open-ended questions, including follow-up questions (at least 70% of questions are open-ended).
Affirmations				
Low			High	
1	2	3	4	5
No statements of appreciation for the client's strengths or values.	Adviser offers an affirmation, but it misses the mark (e.g., ingenuine or cheerleading affirmations).	Adviser provided one or two mediocre affirmations (e.g., cheerleading affirmations).	Adviser makes repeated efforts to identify client's strengths and or values.	Several well-timed affirmations offered, highlighting specific positive strengths.
Uses Reflections				
Low			High	
1	2	3	4	5
Adviser offers no reflections.	Adviser sporadically offers simple reflections.	Adviser makes reflections but misses some opportunities to do so.	Adviser offers several reflections throughout the conversation.	Adviser shows a marked and consistent effort to make simple and complex reflections.
Summaries				
Low			High	
1	2	3	4	5
Adviser offers no summary statements.	Adviser summarizes the agenda items discussed at the end of the meeting but does not summarize the client's thoughts and desires.	Adviser attempts to summarize the client's thoughts and desires.	Adviser thoughtfully and accurately summarizes the client's thoughts and desires.	After first asking for permission, adviser thoughtfully and accurately summarizes the client's thoughts and desires.
The Fix-it Reflex				
Low			High	
1	2	3	4	5
On two or more occasions, the adviser corrects a client's faulty beliefs, gives unsolicited advice, or speaks ill of others.	At least once, the adviser corrects a client's faulty beliefs, gives unsolicited advice, or speaks ill of others.	Adviser abjures from correcting a client's faulty beliefs, giving unsolicited advice, or speaking ill of others.	Adviser abjures from correcting a client's faulty beliefs, giving unsolicited advice, or speaking ill of others. Voices empathy.	Adviser abjures from correcting a client's faulty beliefs, giving unsolicited advice, or speaking ill of others. Voices empathy. Asks permission to give advice.
Prioritizes the Client's Talking Time				
Low			High	
1	2	3	4	5
Adviser talks most of the time (approximately 70% of the time).	Adviser talks more than half the time (approximately 60% of the time).	Adviser talks about half the time.	Adviser does less of the talking (approximately 40% of the time).	Adviser makes a point to solicit the client to do most of the talking (adviser talks approximately 30% of the time).