



PINNACLE
BUSINESS GUIDES



CHECKLIST

15 SIGNS YOU'RE READY TO BECOME A HIGH-IMPACT PINNACLE GUIDE

YOU'VE REACHED THE PEAK OF YOUR CAREER—navigated complexity, delivered results, and honed instincts that kick in when decisions matter most. Now the question becomes: are you ready to turn that hard-won perspective into transformative guidance for others?

CHECK EACH STATEMENT THAT DESCRIBES YOU.

EXPERIENCE & CREDIBILITY

- ☐ 1. I have 10+ years of leadership experience driving results in complex organizations.
- ☐ 2. I've led through real pressure: growth, decline, crisis, or major change.
- ☐ 3. I can read the terrain: financials, operations, and strategy well enough to advise owners with clarity and confidence.

COACHING & LEADERSHIP CAPACITY

- ☐ 4. I know how to balance empathy with accountability.
- ☐ 5. I'm comfortable challenging leaders when it serves their growth.

- ☐ 6. I listen deeply before offering solutions—and executives and peers have consistently sought my perspective.

- ☐ 7. I can translate big-picture vision into footholds & practical execution.

ENTREPRENEURIAL READINESS

- ☐ 8. I'm prepared to build a professional practice, not "join a program."
- ☐ 9. I take ownership of revenue, relationships, and results.
- ☐ 10. I'm willing to consistently invest time in relationship-building and visibility.
- ☐ 11. I'm disciplined enough to manage my own schedule, priorities, and pipeline.

PERSONAL & LIFE ALIGNMENT

- ☐ 12. My family/partner understands and supports this business model.
- ☐ 13. I'm naturally comfortable positioning myself as a credible advisor to CEOs and business owners.
- ☐ 14. I have the financial and emotional runway to build intentionally.
- ☐ 15. I'm committed to long-term mastery—not quick wins or short-term exits.

TURN TO THE NEXT PAGE
TO SEE HOW YOU SCORED



YOUR SCORE



12-15 CHECKS:

You show strong alignment across experience, mindset, and life stage. You're well positioned to move forward with confidence.



5-7 CHECKS:

You have meaningful foundations in place. With intention and preparation, this could become a strong next chapter—clarity on timing and priorities will be key.



8-11 CHECKS:

You're close. A few gaps may need attention, but they're often solvable with focus, support, and the right development path.



0-4 CHECKS:

You may be earlier in the journey than you think. This is a valuable moment to keep building so you're ready when the timing feels right.

Key Insight

The number one concern for aspiring advisors is "Can I actually generate clients?" If you checked most items above but lack client acquisition confidence, that's completely normal. This skill can be built with the right methodology and support.

READY TO TAKE THE NEXT STEP? Book a Discovery call

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