



Partners in Stewardship • Trusted Professionals Guiding Faithful Giving

Member Self-Assessment & Reflection

Take a moment to reflect on your engagement with the Professional Advisors Network.
This brief assessment helps you evaluate the value you receive from and contribute to the Network.

Name: _____ Date: _____ Years as a member: _____

ASSESSMENT AREA *Please rate each statement 1–5 (5 = strongly agree)*

	1	2	3	4	5
I actively participate in Network meetings, events, and communications.	☐	☐	☐	☐	☐
I contribute to the Network by sharing expertise, ideas, relationships, or opportunities.	☐	☐	☐	☐	☐
The Network provides value to my professional practice and client relationships.	☐	☐	☐	☐	☐
The Network has strengthened my understanding of charitable and planned giving for the parishes, schools, and ministries of the Archdiocese of St. Louis.	☐	☐	☐	☐	☐
My level of participation is appropriate for the value I receive from the Network.	☐	☐	☐	☐	☐
I am comfortable inviting other Catholic professionals to join the Network.	☐	☐	☐	☐	☐

REFLECTION What has been the most valuable aspect of your participation in the Network?

In what ways have you contributed to the Network during the past year?

SUGGESTIONS What suggestions to improve the Network would you like to make?

LOOKING AHEAD *Check all that apply*

Next year, I would like to:

- | | |
|--|--|
| ☐ Attend educational events regularly | ☐ Mentor another member |
| ☐ Refer a prospective member | ☐ Introduce a charitable planning opportunity to a client |
| ☐ Present on a topic of expertise | ☐ Serve on a planning committee |
| ☐ Participate in a panel discussion | ☐ Other: _____ |

Signature: _____ Date: _____

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