

PRE-DECISION ADVISORY

The Platform Decision Filter

THE FIRST DOMINO

Set this correctly and the field narrows automatically.

DECISION BOUNDARY QUESTION

What job are you hiring this platform move to do?

Not the payout.

Not the transition package.

Not the forgiven loan.

The job is the specific outcome that must be true five years from now for this move to have been worth it.

*Most advisors can't answer that cleanly when I ask it. **That's usually when we start over.***

WHY THIS QUESTION COMES FIRST

If you cannot clearly define the job this move is being hired to do, no platform evaluation is legitimate. The job belongs to you — not the platform. If the job isn't clear before the first recruiting conversation, every platform will seem possible, and nothing will narrow.

THE CORRECT SEQUENCE

1. You define the job
2. Platforms are evaluated against it
3. Field narrows. Your decision is deliberate.

THE BROKEN SEQUENCE

1. Platform pitches start
2. Economics dominate
3. Fatigue sets in. Momentum decides.

Platforms don't get to define the job.

You do.

Everything else follows.

My work is simple: help you make a deliberate, defensible decision.

The Recruiting Conversation Scorecard

A structural audit of platform integrity.

One Red stops the process. Two Yellows require written confirmation before you continue.

Once the job is defined, audit the platform's behavior against it. This is where the field narrows.

1. **Green** — *Structural Transparency*

The platform supports the job and tells you the truth.

SIGNALS

- Written fee schedules
- Plain-language clawback terms
- Attrition rate shared without being asked

INTERPRETATION

You have what you need to continue.

ACTION

Proceed to the 9 Forensic Questions for full benchmark scoring.

2. **Yellow** — *Structural Vagueness*

The platform might support the job, but the truth is still verbal or vague.

SIGNALS

- Verbal estimates
- Standard industry language
- Vague transition support timelines

INTERPRETATION

The job might be possible here — but you're flying blind.

ACTION

Slow the process. Get everything in writing before the next meeting.

3. **Red** — *Structural Deflection*

The platform does not support the job or won't tell you the truth.

SIGNALS

- Deflection on fees or exit terms
- No attrition data
- "Trust us" answers to structural questions

INTERPRETATION

Momentum gets expensive here.

ACTION

Remove from consideration. Deflection is not a negotiating posture — it's a preview of the relationship.

Continued — Reading the Signals & Next Steps →

Reading the Signals & Next Steps

What the scorecard is actually telling you.

WHEN YOU SEE GREEN

Written answers to structural questions are the baseline of a high-integrity platform. A partner willing to put economics, clawbacks, and attrition data in writing expects you to stay because the fit is right — not because leaving is expensive.

WHEN YOU SEE YELLOW

Verbal assurances are common early. The question is whether they convert to written documentation when you ask. A platform that resists putting terms in writing is telling you how it intends to govern the relationship after you sign. Push hard here. The ones worth working with will comply.

WHEN YOU SEE RED

Deflection on structural questions — fees, clawback triggers, exit terms, attrition data — is not a negotiating posture. It's a preview of the relationship. If they won't answer it now, when they want your book, they will not answer it later when you are locked in. Walk away before momentum makes this harder to unwind.

THE NEXT STEP

If you want the complete framework — nine forensic questions with benchmarks across every dimension of this decision — text CLARITY to 414-418-2011 and I'll send it personally.

No pitch. No firms. No follow-up unless you ask.

One job. Your decision. Not theirs.

Text CLARITY to 414-418-2011

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transitionchecklist.com | 414-418-2011