



Tell us about yourself...

Age: 30-40
 40-60
 60-80

Income: \$100,000-\$250,000
 \$250,000-\$350,000
 \$350,000+

Investable Assets:

\$0-\$100,000
 \$100,000-\$250,000
 \$250,000-\$500,000
 \$500,000 +

Employment:

Employed and retirement is 10+ years away
 Employed and retirement is 5-10 years away
 Retired within the last 5 years
 Retired

What best describes you?

- a. Actively looking for a financial advisor.
- b. Open to working with a financial advisor.
- c. Want a second opinion on your current finances.
- d. Looking for more information.

Are you the decision maker? Yes No

What is your biggest concern in your life?

How committed are you to overcoming this concern on a scale of 1-5? 1 being not committed, 5 being very committed.

1 2 3 4 5

What is the #1 thing you want to gain from this meeting?
