

Write down your top three financial goals:

1. _____
2. _____
3. _____

What is your current income?

\$ _____

What are your current debts and liabilities?

\$ _____

How much do you have invested in qualified plans? (401k, IRA, etc.)

\$ _____

Do you own a business?

YES / NO

Do you have any other investments? If so, list them:

Are you married?

YES / NO

Do you have children?

YES / NO

Do you financially support anyone other than your spouse/children?

YES / NO

Write down any specific questions you want to ask your Wealth Strategist.
