

**We can help you define and meet your life goals.  
This confidential questionnaire will be used for internal purposes only.**

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Home address: \_\_\_\_\_

Business address: \_\_\_\_\_

Telephone: ( \_\_\_\_\_ ) \_\_\_\_\_ Fax: ( \_\_\_\_\_ ) \_\_\_\_\_

E-mail: \_\_\_\_\_

Your occupation: \_\_\_\_\_

Years employed: \_\_\_\_\_

Your annual income (000's):

\_\_\_ \$0-24 \_\_\_\_\_ \$100-199

\_\_\_ \$25-49 \_\_\_\_\_ \$200+

\_\_\_ \$50-99

Your liquid net worth excluding your home (000's):

\_\_\_ \$0-24 \_\_\_\_\_ \$200-499

\_\_\_ \$25-49 \_\_\_\_\_ \$500-999

\_\_\_ \$50-99 \_\_\_\_\_ \$1,000+

\_\_\_ \$100-199

**What are the three most important obstacles you face at the present time?**

\_\_\_ I've never created a financial plan.

\_\_\_ I don't know how to constantly manage my money.

\_\_\_ When should I invest my money rather than keep it liquid? And where?

\_\_\_ I'm afraid I'll outlive my money.

\_\_\_ I'll be able to retire in style - I think.

\_\_\_ My tax bill is killing me.

\_\_\_ I'd like to do more for my community, but my business needs me.

\_\_\_ I'd like to spend more time with my family, but my business needs me.

\_\_\_ Other \_\_\_\_\_

**What are the three most important opportunities you face at the present time?**

\_\_\_ Create a written investment policy statement.

\_\_\_ Understand your options so you can make wise decisions.

\_\_\_ Manage short-term risk versus long-term rewards.

\_\_\_ Learn how to invest within your risk comfort range.

\_\_\_ Develop a comprehensive plan in a variety of money management areas.

\_\_\_ Understand the tax implications of your investments and invest tax-efficiently.

\_\_\_ Work with a team of experts selected by you.

\_\_\_ Acquire assets that increase your cash flow.

\_\_\_ Set priorities in your life.

\_\_\_ Other \_\_\_\_\_

Please complete and print this form. You can either:

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