



*Your Financial Life Planning
Journey Begins Here*

Date _____

Name _____

**FAMILY WEALTH
MANAGEMENT GROUP**



Financial Life Planning and Wealth Management

Securities offered through LPL Financial, Member FINRA/SIPC. Advisory Services offered through WCG Wealth Advisors, LLC, a registered investment advisor. WCG Wealth Advisors, LLC, The Wealth Consulting Group, and Family Wealth Management Group are separate entities from LPL Financial.

What Keeps You Up At Night?

What are your most important financial concerns? _____

What are your most important non-financial concerns & objectives right now? _____

What family obligations do you have or expect to have? _____

What would you like to accomplish through this engagement? _____

How Do You Make Financial Decisions?

How do you make important investment decisions? _____

Have you ever done anything strange or excessive with your investments? _____

Regarding investments, what do the words "risky" or "conservative" mean to you? _____

How Do You Feel About Money?

How was money handled in your family growing up? _____

“The future belongs to those who believe in the

What kinds of lessons regarding money have you tried to teach your children and/or grandchildren?

Regarding your current holdings, what are you most pleased about and what are your greatest concerns?

Whom Do You Turn To For Advice?

Have you ever worked with a CERTIFIED FINANCIAL PLANNER™ Professional? _____

Who are your other advisors? _____

What are their strengths and weaknesses in your eyes? _____

Have you ever been involved in litigation? Yes___No___ What happened? _____

How Can We Provide Value?

For this relationship to be a good experience for you, what three things would have to happen?

1. _____

2. _____

3. _____

What Do You Dream About?

Are you pessimistic/optimistic? _____

How do you envision your lifestyle 5 years from now? _____

What will your legacy be? _____

beauty of their dreams.” — Eleanor Roosevelt

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