

"The future belongs to those who believe in the beauty of their dreams." — Eleanor Roosevelt

Planning

**FAMILY WEALTH
MANAGEMENT GROUP**



Financial Life Planning and Wealth Management

81 Crown Mountain Place, A-500 Dahlonega, GA 30533 • tel 706-864-8631 • fax 706-867-8667 • www.familywmg.com

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.

Mark each statement below with the level of your agreement with the phrase:

I am comfortable using debt and credit.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

The stock market is the best place to make money.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

People should live on less than what they earn.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

I have consistently followed the above guideline in my life.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

I have been tempted at times to make wealth quickly.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

It is good to splurge at times to help you enjoy life.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

Becoming wealthy has a lot to do with luck and good fortune.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

Over time your home is your best investment.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

Insurance on your life, income, and investments is extremely important.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

Personalized and trustworthy financial advice is hard to find.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

There is too much confusion on how financial institutions are being paid.

1- Totally agree 2- Somewhat agree 3- Not sure 4- Disagree 5- Strongly disagree

What guidelines or rules do you attempt to follow in regards to managing your money and investments?

What experiences have you had with investments that have been productive?

What experiences have you had that have been disappointing?

What investment concepts are you simply not interested in?

What are your expectations of a financial advisor? How much communication would you like?

Do you have hesitations about working with an advisor?



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