

New Look/Second Opinion Questionnaire

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 1-10? 1 being not committed, 10 being very committed. 1 2 3 4 5 6 7 8 9 10

What are the Top 3 goals you want to achieve over the next 3-5 years?

(You can add more than three if you'd like, but put them in order of priority)

- 1.
- 2.
- 3.

What are the 3 biggest changes you want to make in your life over the next three years

- 1.
- 2.
- 3.

What are the Top 3 things you would like to no longer have in your life?

- 1.
- 2.
- 3.



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

Do you have a current financial advisor? Y N

If yes,

What are the Top 3 things that they are doing well?

- 1.
- 2.
- 3.

What are the Top 3 things you think they could improve on?

- 1.
- 2.
- 3.

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