

Your Issues and Concerns

**Please complete this survey by marking your most accurate response to each question.
We will use this survey during our meeting to focus on your most important concerns.
If you have a partner, each of you should complete the survey independently.**

Name: _____

Date: _____

Tax Planning	Do you feel you pay too much in income taxes?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Are you using all the legal tax loopholes to reduce your taxes?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable

Retirement Planning	Are you already retired?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you plan on retiring soon?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you know at what age you would like to retire?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you have enough money for retirement?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you own a retirement plan from a previous employer?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable

Education Planning	Do you plan on having (more) children?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you have sufficient funds for your children's education?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Have you determined final inflation adjusted college costs?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Is the money invested properly?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Are there any other family members (grandchildren, etc.) that you wish to assist with education funding?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable

Investment Planning	Do you need financial organization?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you have sufficient cash flow?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you need budget planning?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Are all of your investments managed in a coordinated fashion?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Has your portfolio been reviewed by an independent advisor?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable

Insurance Planning	Do you have the right amount of Life Insurance?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you have enough Long-Term Disability coverage?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you own a Long-Term Care policy?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you have Comprehensive Health Insurance coverage?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Are you paying too much for your insurance policies?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable

Your Issues and Concerns (continued)

Company Benefits	Are you taking full advantage of your company benefits?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you know if your company benefits are adequate?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you know if your company pension plan is adequate?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you plan on changing jobs?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable

Estate Planning	Do you have wills?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Have you had your wills reviewed recently?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Have you done inheritance planning?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you have trusts?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Will your estate avoid probate?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Are you the beneficiary of any wills or trusts?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable

Mortgage Planning	Do you plan on moving?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you plan on buying a home?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you plan or need to refinance your home?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you need mortgage or other financial analysis?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable

Overall Planning	Do you need a coordinated integrated financial plan?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you spend enough time on planning your finances?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Do you know what a Certified Financial Planner does?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable
	Have you set specific financial goals?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Unsure	<input type="radio"/> Not applicable

Additional Comments or Concerns	
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