

First Client Meeting Questionnaire

Read and answer the following questions.

WHAT DO YOU SEE YOURSELF ACCOMPLISHING AS A RESULT OF OUR MEETING TODAY?

WHAT ARE YOU GOING TO DO WITH THE REST OF YOUR LIFE?

SUCCESS MEANS DIFFERENT THINGS TO DIFFERENT PEOPLE. WHAT'S IMPORTANT ABOUT SUCCESS TO YOU?

IF YOU COULD HAVE ANYTHING YOU WANTED, ANYTHING AT ALL, WHAT WOULD IT BE?

WHAT'S IMPORTANT ABOUT MONEY TO YOU?

IF YOU WERE HURT OR SICK AND COULDN'T WORK, HOW WOULD YOU PAY YOUR BILLS?

MAKE BELIEVE YOU'RE GONE AND YOU'RE LOOKING OVER THE SHOULDERS OF YOUR EXECUTOR. WHAT DO YOU WANT TO SEE HAPPEN?

HAVE YOU SET GOALS AND DESIGNED YOUR RETIREMENT TO LAST FOR AS LONG AS YOU LIVE?

ON WHAT DATE DO YOU WANT TO BE FINANCIALLY INDEPENDENT?

IF WE WERE HAVING THIS DISCUSSION THREE YEARS DOWN THE ROAD, AND YOU WERE LOOKING BACK OVER THAT PERIOD, WHAT HAS TO HAPPEN FOR YOU TO FEEL HAPPY WITH YOUR PROGRESS?

Robert G. Miller, Certified Financial Planner Practitioner

Date

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