

QUESTIONNAIRE: PERSONAL INSIGHTS

Name(s):

Date:



If you had all the money in the world, what would you be doing differently from what you're doing now?

If you had a car accident and were disabled so that you could not work, how would it change your income and lifestyle?

You just returned from the doctor's office and found that you have five to seven years to live. However, you will be healthy for all of those years. How would you live your last five to seven years?

If there are issues that you are concerned about or other information you wish to share, please use the space below.

Are you missing anything in your life right now that is important to you? What's not happening that you want to happen?

Where do you want to be and what do you want to be doing in five years?

In ten years?

If we could help you reach your retirement savings goal, finance college education, provide for your family in an event of untimely death, and help you evaluate your investment plan, what would that change for you?