

Financial Attitude Questions for: _____

Who and what do you care about and why? _____

What is the most important thing to you in this world? _____

What is your most important financial goal? _____

What is your biggest financial fear? _____

What keeps you up at night? _____

What is your best source of financial comfort? _____

What is the one thing you value most in a financial adviser? _____

What is important to you about money? _____

How do you feel about providing for your children/grandchildren's education?

What effect would inheriting a substantial amount of money have on your children/grandchildren?

What do you want your life insurance to do for you/your family? _____

In your estimation, what is the greatest financial risk you face for the rest of your life?

Are your current financial plans exposing you to or defending you from that risk? How?

Do you expect any significant changes to your income/asset situation in the next 5 years? If so, explain. _____

On a scale of 1-10 would you consider yourself a (1) aggressive or (10) conservative investor? _____

Assuming you owned \$100,000 of a particular stock, which scenario would bother you more?
____ You sold the stock - and it went up 50% ____ You kept the stock - and it dropped 50%

On a scale of 1-10 how important is it to you to preserve your estate for the benefit of your children/grandchildren with (1) being unimportant and (10) being very important? _____

What percentage of your estate would you like to leave to: (Should total 100%)
Family: _____ Charity: _____ Government: _____