

**INTRODUCTION QUESTIONNAIRE**

- 1. THE TOP 3 FINANCIAL ISSUES YOU ARE FACING**
  
- 2. WHAT ARE YOUR TOP FINANCIAL GOALS?**
  
- 3. HOW DO YOU DO YOUR INVESTING?**
  
- 4. HAVE YOU DONE A FINANCIAL PLAN?**
  
- 5. DO YOU HAVE AN ADVISOR, CPA?**
  
- 6. HOW DO YOU GET FINANCIAL ADVICE?**
  
- 7. DO YOU HAVE A COMPANY RETIREMENT PLAN?**
  
- 8. HOW OFTEN DO YOU REVIEW YOUR PORTFOLIO?**
  
- 9. HOW OFTEN DO YOU REVIEW YOUR INSURANCE – AUTO, HOME, LIFE?**
  
- 10. WHEN DO YOU PLAN ON RETIRING?**