Questionnaires to think about before the meeting.

1. What is your 3 major financial goals? Retirement, legacy, college savings, etc…
2. What are nice to have financial goals? Vacation, wedding payment for children, etc…
3. Could you give us list of things you have done so far to prepare for those priorities?
4. What is your current income level? This is to estimate your social security income and potential saving target each month.
5. Tell me more about your family, parents, and your children. How do they fit in your financial picture?
6. Currently what are your financial assets and liabilities look like? 401K, IRA, Mortgage, other loans and assets.