

2 Minute Money Check-In

* Indicates required question

Millennials and Gen Y Face real Financial Challenges - Adulting is tough enough - managing your money shouldn't make it harder. Answer a few quick questions to get a snapshot of where you stand and unlock a **free 15-minute financial strategy session** (no sales pitch, I promise)



1. How confident do you feel about your current financial plan? *

Check all that apply.

- ☐ Not confident at all - I'm winging it
- ☐ Somewhat confident - I've got a few things in place
- ☐ Very confident - I'm on top of it

2. **Which financial challenges are you currently facing? (select all that apply) ***

Mark only one oval.

- ☐ Student loans or lingering education debt
- ☐ High cost of living making it hard to save
- ☐ Credit card or personal debt
- ☐ Struggling to build an emergency fund
- ☐ Unsure how to start investing/grow wealth
- ☐ Rising housing costs or trouble saving for a home
- ☐ Inconsistent income or career changes
- ☐ Balancing multiple goals (travel, family, retirement)
- ☐ Other: _____

3. **Which goals matter most to you right now? ***

Mark only one oval.

- ☐ Paying off debt faster
- ☐ Building savings & financial safety nets
- ☐ Investing & growing long-term wealth
- ☐ Buying a home or property
- ☐ Planning for retirement (yes, even early!)
- ☐ Affording travel/lifestyle experiences
- ☐ Protecting income & assets (insurance, wills, trusts, etc)
- ☐ Other: _____

4. **Do you currently work with a financial professional? ***

Mark only one oval.

- ☐ Yes
- ☐ No
- ☐ Not sure

5. **If you could get clear, personalized guidance - totally free - would you be open to a quick 15-minute strategy session?** *

Mark only one oval.

- ☐ Yes, let's do it!
- ☐ Maybe, I'd like more info
- ☐ Not right now

We need to know who you are...

6. **First and Last Name** *

7. **Email address:** *

8. **Phone Number (optional)**

Once you hit submit, you'll get a link to schedule your complimentary 15-minute session with Carla who understands these struggles - no pressure, no jargon, just real talk.

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