

Name:

Today's Date:

Date of Appointment,
IF Scheduled:

Brain Dump

Let us help you articulate your situation. Put a check beside any that apply to you:

<input type="checkbox"/> I am working towards my financial goals.	<input type="checkbox"/> I worry I will outlive my money.	<input type="checkbox"/> I don't know how my business will help me in retirement.
<input type="checkbox"/> I am stressed about finances.	<input type="checkbox"/> I have no strategy to overcome obstacles.	<input type="checkbox"/> I have a clear path to retirement.
<input type="checkbox"/> I have undefined goals.	<input type="checkbox"/> I do not take advantage of my 401(k) match.	<input type="checkbox"/> I am worried about estate taxes.
<input type="checkbox"/> I can see my investments growing.	<input type="checkbox"/> I am not sure why I save money.	<input type="checkbox"/> I have unfinished estate plans.
<input type="checkbox"/> I have aging parents I need to care for.	<input type="checkbox"/> I do not review or use available tools to achieve my goals.	<input type="checkbox"/> I am not sure if I should borrow or pay cash for big purchases.
<input type="checkbox"/> I do not write down goals.	<input type="checkbox"/> My insurance coverage is adequate.	<input type="checkbox"/> I have inadequate emergency savings.
<input type="checkbox"/> My money is allocated in the wrong investments.	<input type="checkbox"/> I am afraid to spend money.	<input type="checkbox"/> I have no idea if my employer plan is set up correctly.
<input type="checkbox"/> I want to take a big vacation.	<input type="checkbox"/> I don't have a plan.	<input type="checkbox"/> I never take vacations.
<input type="checkbox"/> I do not identify obstacles to my goals.	<input type="checkbox"/> I pay high taxes.	<input type="checkbox"/> I would like to invest more.
<input type="checkbox"/> I spend more than I make.	<input type="checkbox"/> I have health problems.	<input type="checkbox"/> I have too many accounts/advisors.

BluePrint Financial Planning
bpfinancialplanning.com

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