

Name:
 Date:
 Date of Appointment:

Brain Dump

Let us help you articulate your situation. Put and x 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
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