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Getting To Know You Questionnaire

Name:

Date:

How can I help you?

What are you looking for in an advisor?

What are your expectations (of me, this process, this experience, etc)?

Tell me about your experience with other advisors.

Who else should be involved in this process?

What is important to you about life?

In your prior financial experiences, what were your proudest moments? Biggest regrets?

What goals have you set for yourself now?

What keeps you up at night?

What scares you about your current financial situation?

What does money mean to you?

Describe your relationship with money.

What are your short, mid, and long-term goals?

What do you want your retirement to look like?

If you are not on track, what are you willing to change to get back on track?