



THE GOALS DRIVER™ QUESTIONNAIRE

NAME: _____

DATE: _____

I²M Goals Driver™

Critical Directives Questions

What are the three biggest dangers/concerns that you wish to prevent or eliminate?

Dangers/Concerns:

1. _____

2. _____

3. _____

What are the three biggest opportunities to be focused on or captured in your planning?

Opportunities:

1. _____

2. _____

3. _____

What are the three biggest strengths to be maximized or reinforced?

Strengths:

1. _____

2. _____

3. _____

Concerned About:

- Cash Flow
- No Disciplined Savings
- No Strategy to Meet Goal
- Too Much Debt
- Long-Term Care
- Inadequate College Savings
- Rate of Return
- Family Protection
- Job Security
- Too Many Advisors
- Lack of Budget
- Retirement
- No Trust in Advisors
- No Vision of the Future
- No Time for Vacation
- No Goals
- Uncomfortable with Market
- Volatility of Portfolio
- Disability
- Health of Family
- Taxes
- Overspending
- Real Estate
- Lack of Liquidity
- Divorce
- All Benefits Tied to Employer
- Conflicting Priorities
- Cannot Relax

Confident About:

- New Job
- Increased Income
- Children Have Left
- Inheritance
- Selling Home
- Stock Options
- Lottery Winnings
- Real Estate Equity
- New Business Venture
- Increased Retirement Savings
- Better Employment Benefits
- Job Tenure
- Eliminated Debt
- Paid Off Car
- Loss of Dependents
- Paid Off Home
- Lower Interest Rates
- Eliminated Debt
- Tax Credits
- Parents Gifting

Excited About:

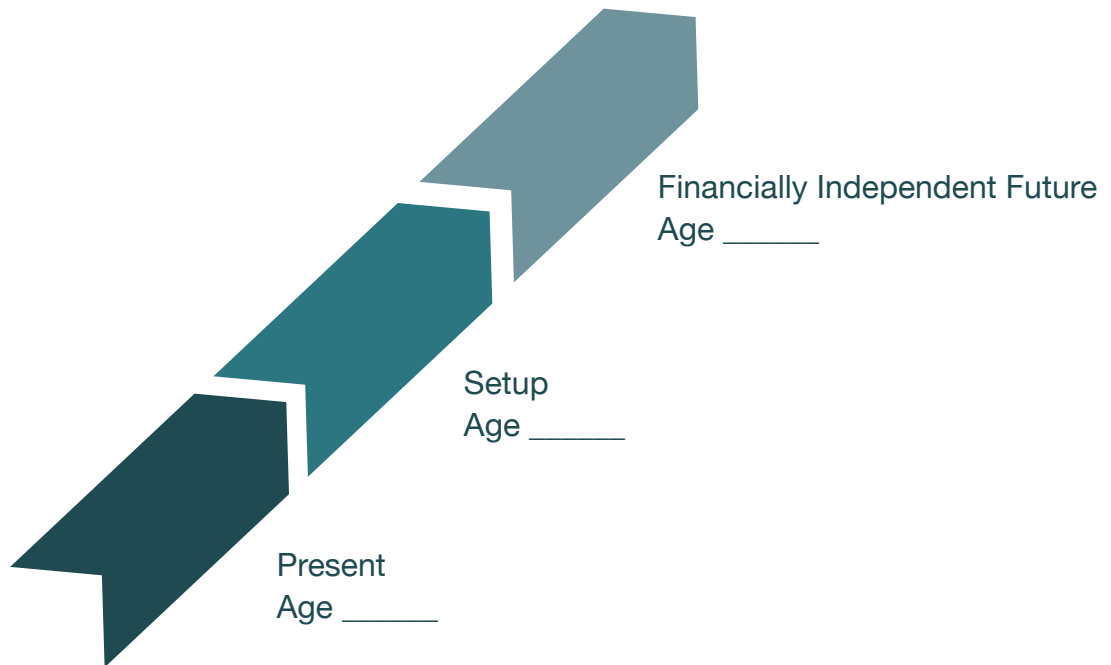
- Relationship with Spouse
- Communication with Spouse / Children
- Reputation in the Community
- Company Pension
- Company Benefits
- Job Security
- Excessive Cash Flow
- Disciplined Saving
- Live Within Means
- Adequate Retirement Savings
- Equity in Home
- Great Advisors
- Strong Investment Returns
- Goal Oriented



If you and I meet three years from today and again at the end of your life, what would have to happen **personally, professionally & financially** for you to feel that you had protected and enhanced your lifestyle and had begun to realize or had **realized your dreams**?

Realized Your Dreams

END OF LIFE



Realized Your Dreams

3 YEARS



1000 Potomac St. NW, Suite 300
Washington, DC 20007
o: (240) 482-4000
f: (240) 482-4001
t: (800) 388-2386
www.CapitalAMG.com



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