

Financial Planning • Employee Benefits • Wealth Management

Please help us understand your Hopes, Dreams, and Goals

1. What life changes are you expecting in the next 3-5 years?

2. With respect to your personal goals, what do you know that you have to do? (i.e. fund children's education; plan for retirement; pay down student loan debt, purchase second home, provide care for family member, change careers, etc.)

3. Are there concerns or thoughts about your future that worry you?

4. How do you define retirement (that point in your life where paid employment is optional)?

5. What aspects of your life do you treasure most? What leisure activities are you currently involved in?

6. Its 9am on a sunny Tuesday morning ten years from today. What are you doing?

7. What is the legacy you would like to leave to your heirs?