

Financial Planning • Employee Benefits • Wealth Management

Please help us understand your Hopes, Dreams, Goals and Visions

1. Are you expecting any major life changes in the next 3-5 years?

2. With respect to your goals, what do you know that you have to do? (i.e. pay for children's education; fund retirement; purchase second home)

3. What are you worried about?

4. How do you define retirement?

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

6. It's 9am on a Tuesday morning ten years from today.
 - a. What are you doing?
 - b. What hobbies would you want to be involved in and in what capacity?

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