

Planning Questionnaire

Date:

Name:

Spouse:

1

If we were sitting here three years from today, looking back over the previous three years, what would have happened in your business and personal lives over that period of time in order for you to feel that you had made good to excellent progress?

2

What do you feel is your most important personal goal? (Mid, Long Term)

3

How do you feel about renting vs. buying a home?

4

How do you feel about your career?

5

In your opinion, what percentage of income should be saved?

6

How do you feel about saving for your children's education?

7

How do you feel about saving for retirement? At which age do you wish to retire?

8

What do you want for your life insurance to do for you? Is your mortgage insured through the bank or privately?

9

If diagnosed with a critical illness (cancer, heart attack or stroke) what would be your biggest concern?

10

How long could you live on your reserves if you were disabled tomorrow?

11

Do you have any debts besides your mortgage?