



Understanding your most important **goals** and **concerns** is vital to having a secure financial future.

First, **define** what is working for your investments and what could be improved. Next, **review** different options. Then, make some small tweaks and changes to get your investment "**on track**" with your goals in the coming years.

*Working with a qualified financial professional can be the difference between success and failure.*

## Your Top Goals and Concerns

**What are your top 3 financial goals?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**List your top 3 most important Financial Concerns**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

On a scale of 1-10, how confident are you that your financial goals are being met? \_\_\_\_\_

On a scale of 1-10, how confident are you that you have a plan to handle your financial concerns? \_\_\_\_\_

On a scale of 1-10, how confident are you that you are prepared for the next major stock market move? \_\_\_\_\_