Discovery

Your Financial Life Planning Journey Begins Here

Date____

Name ____

FAMILY WEALTH MANAGEMENT GROUP

Financial Life Planning and Wealth Management

What Keeps You Up At Night?

What are your most important financial concerns?

What are your most important non-financial concerns & objectives right now?

What family obligations do you have or expect to have?

What would you like to accomplish through this engagement?

How Do You Make Financial Decisions?

How do you make important investment decisions?

Have you ever done anything strange or excessive with your investments?

Regarding investments, what do the words “risky” or “conservative” mean to you?

How Do You Feel About Money?

How was money handled in your family growing up?

“The future belongs to those who believe in the bea

What kinds of lessons regarding money have you tried to teach your children and/or grandchildren?

Regarding your current holdings, what are you most pleased about and what are your greatest concerns?

Whom Do You Turn To For Advice?

Have you ever worked with a CERTIFIED FINANCIAL PLANNER™ Professional?

Who are your other advisors?

What are their strengths and weaknesses in your eyes?

Have you ever been involved in litigation? Yes___No___What happened?

How Can We Provide Value?

For this relationship to be a good experience for you, what three things would have to happen?

1.

2.

3.

What Do You Dream About?

Are you pessimistic/optimistic?

How do you envision your lifestyle 5 years from now?

What will your legacy be?

uty of their dreams." — Eleanor Roosevelt

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