



FIRST MEETING QUESTIONS

1. What's On Your Mind?

2. Why Are You Concerned About This Now?

3. On A Scale Of 1-10, How Do You Feel About Your Current Financial Situation?

4. Three Years From Now, What Has To Happen To Consider This A Success?

5. Have You Worked With An Advisor Before? How Did That Go?

6. How Have You Made Money Decisions In The Past?

7. Can I Share With You How We Can Help?

8. What Questions Do You Have?

9. How Would You Like To Proceed?
