

MAPPING A COURSE



1. What prompted you to seek our services?
2. What other life events in the future do you feel that you need to plan for now?
3. Please tell us how you envision your retirement. (Travel? Living where? Working? Volunteering?)
4. Financially, what is going well for you now?
5. What do you want more of in life?
6. What things do you feel are holding you back?
7. How do you envision us helping you?
8. Specifically, what services do you expect us to provide for you?
9. Three to five years down the road you're looking back in time and conclude that our relationship has been a complete success. Contemplate what might have changed in your life.