

PERSONAL STATEMENT OF NEEDS AND EXPECTATIONS

This should be a living document, which we will revisit and amend as projects are completed and your financial situation evolves. In order to prioritize our areas of focus, it's helpful to understand your most pressing issues and concerns. With an understanding of your perspective, I can recommend specific services and benefits that best address those needs.

Here are some issues that other clients have listed:

- We need quality advice as we don't understand our options.*
- Financial planning is overwhelming and I don't have time to do the research.*
- I don't want to have to worry about or pay attention to my investments.*
- We're paying way too much money to the IRS.*
- Our accountant says we have to think about taxes all year long. HELP!*
- How are we ever going to be able to afford to send our kids to college?*

CLIENT A:

- 1.
- 2.
- 3.
- 4.
- 5.

CLIENT B:

- 1.
- 2.
- 3.
- 4.
- 5.