

Desires

What is important about money to you?

What are the two most important areas in which you feel we can help?

1. _____ 2. _____

What are three things you want to accomplish with your wealth as part of your legacy in life?

1. _____
2. _____
3. _____

What are three things you would like to do for your family to secure their security in the future?

1. _____
2. _____
3. _____

What are three financial issues that you are concerned with right now that we haven't discussed?

1. _____
2. _____
3. _____

What are three additional things we could do to strengthen our relationship with you and your family?

1. _____
2. _____
3. _____

The above is an accurate representation of my (our) desires as I (we) have expressed them this _____ day of _____, _____.

Signature

Signature