

Financial Planning Consultation: Financial Goals

Name	E-Mail	Cell Phone
Spouse's Name	E-Mail	Cell Phone

To prepare for your financial planning consultation, it is important that we have a clear understanding of your most important financial goals. By prioritizing your needs below, we will be able to maximize your time according to your needs. Please take just a few minutes to complete the following goal questionnaire prior to your scheduled appointment.

Yes	No	I am/We are interested in:
		Budget planning: Where do I start? (current budget, retirement budget)
		How to pay down debt
		Retirement savings: Where do I start? How much do I need to save? Have I saved enough?
		Do you have an emergency fund? (3 to 6 months of living expenses)
		Saving for vacation and/or travel
		Saving for a major purchase: Home, cabin, auto, etc.
		Building a legacy for my heirs
		College savings for children and/or grandchildren
		Leaving a legacy for charity
		Distribution planning

I/We have used the following investment instruments to achieve our financial goals (please check all that apply):

<input type="checkbox"/>	Bank Savings Account	<input type="checkbox"/>	Certificate of Deposit	<input type="checkbox"/>	US Savings Bonds
<input type="checkbox"/>	Life Insurance	<input type="checkbox"/>	Disability Insurance	<input type="checkbox"/>	Variable Annuity
<input type="checkbox"/>	Individual Bonds	<input type="checkbox"/>	Individual Stocks	<input type="checkbox"/>	Fixed Annuity
<input type="checkbox"/>	Bond Mutual Funds	<input type="checkbox"/>	Equity Mutual Funds	<input type="checkbox"/>	Indexed Annuity
<input type="checkbox"/>	401(k), 403(b), 457	<input type="checkbox"/>	Index Mutual Funds	<input type="checkbox"/>	Money Market Fund
<input type="checkbox"/>	Company Pension Plan	<input type="checkbox"/>	Target Date Mutual Funds	<input type="checkbox"/>	Managed Account
<input type="checkbox"/>	State Pension Plan	<input type="checkbox"/>	WEA Model Portfolios	<input type="checkbox"/>	

Please answer the following questions:

What goals are your priority?	What concerns would you like to discuss?
1.	1.
2.	2.
3.	3.

Items that you might want to bring for your consultation:

- Recent pay stub
- Risk profile questionnaire
- ETF statement
- Copy of your recent income tax return
- Account statements
- Documents necessary for discussion topics
- Budget Worksheet

All investment advisory services are offered through WEA Financial Advisors, Inc., an SEC registered investment advisor.