WEA Member Benefits™
Every member financially secure.

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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):

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

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