Lead Magnet Style & Tone Synthesis

**"Is Your Love Life Draining Your Bank Account?"**

**3-Minute Assessment for Relationship-Smart Money Management**

**Introduction:** *You're working hard and making decent money, but somehow your relationships keep throwing your finances off track. Sound familiar? This quick assessment reveals how your emotional connections impact your spending—and shows you a clear path to financial freedom without sacrificing the relationships you value.*

**Question 1: Financial Stress Reality Check**

**How often does money stress interfere with your daily life?**

* [ ] Rarely - I have most things under control (1 point)
* [ ] Sometimes - usually around bill time (2 points)
* [ ] Weekly - it's becoming a regular concern (3 points)
* [ ] Daily - it's constantly on my mind (4 points)

**Question 2: Relationship Spending Triggers**

**In the past month, which of these led to unplanned spending?** *(Select all that apply)*

* [ ] Date nights that went over budget (2 points)
* [ ] Stress-shopping after relationship conflicts (3 points)
* [ ] Keeping up with friends' lifestyle choices (2 points)
* [ ] Family obligations and guilt purchases (2 points)
* [ ] Celebrating relationship milestones (1 point)
* [ ] None of these apply to me (0 points)

**Question 3: Money Communication Comfort**

**Rate your comfort level discussing finances:** *(1=Avoid it, 5=Totally comfortable)*

* With romantic partner: 1 2 3 4 5
* With close family: 1 2 3 4 5
* With friends: 1 2 3 4 5

**Question 4: Financial Planning Style**

**Which best describes your current money management?**

* [ ] I budget carefully but life keeps derailing my plans (3 points)
* [ ] I track spending but struggle with emotional purchases (2 points)
* [ ] I have a general idea but no formal system (1 point)
* [ ] I wing it and hope for the best (0 points)

**Question 5: Relationship vs. Money Goals**

**How often do your social/relationship needs conflict with your financial goals?**

* [ ] Constantly - I can't say no to anything social (4 points)
* [ ] Often - it's a regular source of stress (3 points)
* [ ] Sometimes - mostly around big events (2 points)
* [ ] Rarely - I've found good balance (1 point)

**Question 6: Emergency Readiness**

**If a relationship crisis hit tomorrow (breakup, family emergency), you could:**

* [ ] Handle it financially with 3-6 months saved (1 point)
* [ ] Manage with some stress using current savings (2 points)
* [ ] Struggle significantly but figure it out (3 points)
* [ ] Be in serious financial trouble (4 points)

**Question 7: Spending Motivation**

**Your biggest spending triggers are usually:**

* [ ] Trying to maintain relationships and social connections (2 points)
* [ ] Stress relief after emotional situations (3 points)
* [ ] Celebrating good times with people I care about (1 point)
* [ ] Keeping up appearances with my social circle (2 points)

**Question 8: Tool Investment Mindset**

**If there was a solution that connected your relationship wellness to better money management, you would:**

* [ ] Definitely invest if it showed clear results (3 points)
* [ ] Try it if the price was reasonable (2 points)
* [ ] Need to see lots of proof first (1 point)
* [ ] Probably stick with free options (0 points)

**Your Information**

**Get your personalized "Relationship-Money Balance Score":**

**Basic Info:**

* **First Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Email:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Quick Demographics:**

* **Age:** 25-29 | 30-34 | 35-39 | 40+
* **Income Range:** $40-60k | $60-80k | $80-100k | $100k+
* **Relationship Status:** Single | Dating | Partnered | Married
* **Location (City, State):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Priority Assessment:**

* **Biggest money-relationship challenge:** *(Choose one)*
  + [ ] Overspending on social activities
  + [ ] Partner disagreements about money
  + [ ] Family financial obligations
  + [ ] Emotional spending patterns
  + [ ] Lack of emergency savings

**What You'll Get Instantly:**

✅ **Your Relationship-Money Balance Score** (personalized insights) ✅ **Custom Action Plan** for your specific situation  
✅ **Free Guide:** "The Relationship-Smart Budget Blueprint" ✅ **Exclusive Mid-Tier Beta Access** to Ratchet Money (normally $20/month) ✅ **Weekly Tips** connecting emotional wellness to financial success

**Why This Matters for Mid-Tier Users:**

*"You're past the basics and ready for real solutions. This assessment identifies the specific relationship-money patterns holding you back and provides a clear roadmap to financial freedom—without sacrificing the connections that matter most."*

**Scoring for Mid-Tier Targeting:**

**8-15 points:** "Balanced Builder" - Ready for optimization tools **16-25 points:** "Relationship Spender" - Perfect mid-tier candidate  
**26+ points:** "Crisis Manager" - Needs comprehensive support

*Privacy Note: Your responses help us provide personalized recommendations. We never share personal information and you can unsubscribe anytime.*

Tax Bill Related Questionnaire

# **Demographic-Specific Tax Impact Questionnaires**

**Questionnaire A: Under $50,000 Annual Income**

**Basic Demographics & Income**

**1. What is your current annual household income?**

* Under $30,000
* $30,000 - $40,000
* $40,000 - $50,000

**2. What is your tax filing status?**

* Single
* Married filing jointly
* Head of household
* Married filing separately

**3. What percentage of your income comes from tips or overtime pay?**

* None
* 1-25%
* 26-50%
* Over 50%

**Current Health Insurance Status**

**4. What is your current health insurance coverage?**

* Medicaid
* Employer-provided insurance
* ACA Marketplace plan
* Uninsured

**5. If you have Medicaid, how consistently do you work 80+ hours per month?**

* Always meet 80+ hours
* Sometimes - depends on available gig work
* Rarely meet 80+ hours
* Not applicable (don't have Medicaid)

**6. What are your current annual healthcare expenses (out-of-pocket)?**

* Under $500
* $500 - $1,500
* $1,500 - $3,000
* Over $3,000

**Aging Parent Impact Assessment**

**7. Do you have aging parents who may need your financial support?**

* Yes, currently providing support
* Yes, but not currently providing support
* No aging parents

**8. [If yes] What is your aging parent(s)' health insurance status?**

* Medicare + Medicaid (dual eligible)
* Medicare only
* Don't know
* Not applicable

**9. How much can you realistically contribute to aging parent support annually?**

* Cannot provide financial support
* Under $1,000
* $1,000 - $3,000
* Over $3,000

**Financial Goals & Planning**

**10. What is your current emergency fund balance?**

* No emergency fund
* Less than 1 month of expenses
* 1-3 months of expenses
* Over 3 months of expenses

**11. How secure do you feel about your current income?**

* Very insecure - income varies significantly
* Somewhat insecure - occasional income gaps
* Generally secure
* Very secure

**12. What best describes your current debt situation?**

* Struggling with debt payments
* High debt burden impacting budget
* Manageable debt
* No significant debt

**Future Planning Considerations**

**13. In the next 3 years, what is your biggest financial concern?**

* Basic living expenses and bills
* Healthcare costs for family
* Losing current benefits or coverage
* Supporting aging family members

**14. How important is it to understand how policy changes affect your finances?**

* Critical - I need to plan for every change
* Important - I want to be prepared
* Somewhat important

**15. What type of help would be most valuable to you?**

* Step-by-step guidance on maintaining benefits
* Simple tools to track healthcare costs
* Alerts when policy changes affect me
* Basic financial planning assistance

**Questionnaire B: $50,000 - $100,000 Annual Income**

**Basic Demographics & Income**

**1. What is your current annual household income?**

* $50,000 - $60,000
* $60,000 - $80,000
* $80,000 - $100,000

**2. What is your tax filing status?**

* Single
* Married filing jointly
* Head of household
* Married filing separately

**3. What percentage of your income comes from tips or overtime pay?**

* None
* 1-15%
* 16-30%
* Over 30%

**Current Health Insurance Status**

**4. What is your current health insurance coverage?**

* Employer-provided insurance
* ACA Marketplace plan
* Medicaid
* Medicare

**5. How stable is your current employment situation?**

* Very stable - full-time with benefits
* Stable - but limited benefits
* Variable - multiple jobs/gig work
* Unstable - frequent job changes

**6. What are your current annual healthcare expenses (out-of-pocket)?**

* Under $1,500
* $1,500 - $3,000
* $3,000 - $5,000
* Over $5,000

**Aging Parent Impact Assessment**

**7. Do you have aging parents who may need your financial support?**

* Yes, already providing significant support
* Yes, providing some support
* Yes, but not currently providing support
* No aging parents

**8. [If yes] What is your aging parent(s)' health insurance status?**

* Medicare + private supplemental
* Medicare + Medicaid (dual eligible)
* Medicare only
* Don't know

**9. How much do you currently or could you provide in aging parent support annually?**

* $1,000 - $3,000
* $3,000 - $6,000
* $6,000 - $10,000
* Over $10,000

**Financial Goals & Planning**

**10. What is your current emergency fund balance?**

* Less than 3 months of expenses
* 3-6 months of expenses
* 6+ months of expenses
* No emergency fund but have other savings

**11. How would you rate your overall financial stability?**

* Very stable - comfortable with current income
* Mostly stable - occasional financial stress
* Somewhat unstable - living paycheck to paycheck
* Financially stressed

**12. What is your primary debt concern?**

* Student loans
* Credit card debt
* Mortgage/housing costs
* No significant debt concerns

**Future Planning Considerations**

**13. What is your biggest financial priority over the next 5 years?**

* Building wealth and investments
* Supporting aging parents
* Children's education expenses
* Career advancement and income growth

**14. How detailed do you want your financial impact analysis?**

* Very detailed - show me all scenarios
* Moderately detailed - key impacts only
* High-level summary

**15. What type of financial planning tools would help you most?**

* Tax optimization strategies
* Healthcare cost projections
* Family financial planning
* Investment and retirement planning

**Questionnaire C: $100,000+ Annual Income**

**Basic Demographics & Income**

**1. What is your current annual household income?**

* $100,000 - $150,000
* $150,000 - $200,000
* $200,000 - $300,000
* Over $300,000

**2. What is your tax filing status?**

* Single
* Married filing jointly
* Married filing separately
* Head of household

**3. Do you have significant income from tips, overtime, or variable compensation?**

* No - primarily salary-based
* Yes - moderate variable income (under 20%)
* Yes - significant variable income (20%+)
* Yes - substantial variable income (40%+)

**Current Health Insurance Status**

**4. What is your current health insurance coverage?**

* Employer-provided high-deductible plan
* Employer-provided comprehensive plan
* Private insurance
* ACA Marketplace plan

**5. How do you anticipate healthcare policy changes affecting your coverage?**

* Minimal impact - good employer coverage
* Moderate impact - may affect family members
* Significant impact - rely on marketplace/other programs
* Uncertain about potential impacts

**6. What are your annual healthcare expenses including premiums and out-of-pocket?**

* Under $5,000
* $5,000 - $10,000
* $10,000 - $20,000
* Over $20,000

**Aging Parent Impact Assessment**

**7. Do you have aging parents who may need your financial support?**

* Yes, already providing substantial support
* Yes, providing moderate support
* Yes, expect to provide support soon
* No aging parents requiring support

**8. [If yes] What level of care might your aging parents need?**

* In-home care assistance
* Assisted living facility
* Nursing home care
* Uncertain but preparing financially

**9. What is your capacity for aging parent financial support?**

* $5,000 - $15,000 annually
* $15,000 - $30,000 annually
* $30,000+ annually
* Unlimited capacity within reason

**Financial Goals & Planning**

**10. What is your current liquidity situation?**

* Strong emergency fund plus investments
* Adequate emergency fund
* Most wealth tied up in investments/assets
* Limited liquid savings despite high income

**11. How do policy changes typically affect your financial planning?**

* Major impact - I optimize for tax efficiency
* Moderate impact - I adjust strategies accordingly
* Minor impact - I maintain long-term focus
* Minimal impact - I rely on professional advice

**12. What is your primary wealth-building focus?**

* Tax optimization and estate planning
* Investment portfolio growth
* Real estate investments
* Business or equity investments

**Future Planning Considerations**

**13. What is your primary concern about the tax bill changes?**

* Impact on investment and tax strategies
* Increased costs for aging parent care
* Changes affecting family financial planning
* Estate planning implications

**14. What level of financial analysis do you prefer?**

* Comprehensive analysis with multiple scenarios
* Strategic summary with key recommendations
* High-level impact assessment
* Integration with existing financial planning

**15. What type of advanced planning tools would benefit you most?**

* Tax strategy optimization
* Multi-generational financial planning
* Estate planning considerations
* Investment rebalancing recommendations

**Tax Bill Impact Calculator Questionnaire**

**Section 1: Basic Demographics & Income (Questions 1-6)**

**1. What is your current annual household income?**

* Under $30,000
* $30,000 - $40,000
* $40,000 - $50,000
* $50,000 - $60,000
* $60,000 - $80,000
* $80,000 - $100,000
* Over $100,000

**2. What is your tax filing status?**

* Single
* Married filing jointly
* Married filing separately
* Head of household

**3. How many dependent children do you have under 18?**

* 0
* 1
* 2
* 3
* 4 or more

**4. In which state do you currently live?** [Dropdown menu with all states - needed for SALT deduction calculations]

**5. Do you anticipate your income increasing in the next 3-5 years?**

* Yes, significantly (25%+ increase expected)
* Yes, moderately (10-25% increase expected)
* Staying about the same
* Decreasing

**6. What percentage of your income comes from tips or overtime pay?**

* None
* 1-10%
* 11-25%
* 26-50%
* Over 50%

**Section 2: Current Health Insurance Status (Questions 7-11)**

**7. What is your current health insurance coverage?**

* Medicaid
* Employer-provided insurance
* ACA Marketplace plan
* Medicare
* Uninsured
* Other

**8. If you have Medicaid, do you currently work at least 80 hours per month?**

* Yes, consistently
* Sometimes/varies with gig work
* No
* Not applicable (don't have Medicaid)

**9. How many hours per week do you typically work across all jobs?**

* Less than 20 hours
* 20-30 hours
* 31-40 hours
* 41-50 hours
* Over 50 hours

**10. Do you work primarily in:**

* One full-time job
* Multiple part-time jobs
* Gig work (Uber, DoorDash, freelance)
* Combination of traditional and gig work

**11. What are your current annual healthcare expenses (out-of-pocket)?**

* Under $500
* $500 - $1,500
* $1,500 - $3,000
* $3,000 - $5,000
* Over $5,000

**Section 3: Aging Parent Impact Assessment (Questions 12-17)**

**12. Do you have aging parents (60+) who may need your financial support?**

* Yes
* No
* Unsure

**13. [If yes to #12] What is your aging parent(s)' current health insurance status?**

* Medicare only
* Medicare + Medicaid (dual eligible)
* Medicare + private supplemental
* Other
* Don't know

**14. [If yes to #12] What is your aging parent(s)' approximate annual income?**

* Under $20,000
* $20,000 - $35,000
* $35,000 - $50,000
* Over $50,000
* Don't know

**15. [If yes to #12] Do your aging parents live in:**

* Rural area
* Suburban area
* Urban area
* Don't know

**16. [If yes to #12] How much financial support do you currently provide to aging parents annually?**

* None
* Under $1,000
* $1,000 - $3,000
* $3,000 - $6,000
* Over $6,000

**17. [If yes to #12] Do your aging parents have any chronic health conditions requiring regular medical care?**

* Yes, multiple conditions
* Yes, one major condition
* Minor health issues
* Generally healthy
* Don't know

**Section 4: Financial Goals & Planning (Questions 18-22)**

**18. What is your current emergency fund balance?**

* No emergency fund
* Less than 1 month of expenses
* 1-3 months of expenses
* 3-6 months of expenses
* Over 6 months of expenses

**19. What are your top 3 financial priorities? (Select up to 3)**

* Building emergency savings
* Paying off debt
* Saving for homeownership
* Career development/education
* Supporting family members
* Retirement savings
* Healthcare expenses

**20. How confident are you in your current job security?**

* Very confident
* Somewhat confident
* Neutral
* Somewhat concerned
* Very concerned

**21. Do you expect to have children or additional children in the next 5 years?**

* Yes, planning to
* Possibly
* No
* Unsure

**22. What best describes your current debt situation?**

* No significant debt
* Manageable debt (student loans, car payment)
* High debt burden impacting monthly budget
* Struggling with debt payments

**Section 5: Future Planning Considerations (Questions 23-25)**

**23. In the next 5 years, do you anticipate needing to:** (Select all that apply)

* Help pay for aging parent healthcare costs
* Move to a different state
* Change careers
* Start a family
* Buy a home
* Care for aging parents in your home

**24. How important is it for you to understand how policy changes affect your finances?**

* Very important - I want detailed projections
* Somewhat important - I want general estimates
* Not very important - I just want basic information

**25. Would you like to receive personalized recommendations based on your responses?**

* Yes, via email
* Yes, but keep it anonymous
* No, just show me the calculations

**Calculation Framework**

**Current Year Impact Calculation:**

* **Tax Benefit**: Based on income bracket × appropriate percentage reduction
* **Healthcare Cost Increase**: If on Medicaid + work variability + family size
* **Net Current Impact**: Tax benefit - healthcare cost increase

**Future Year Impact Calculation:**

* **Years 1-3**: Full tax benefits, escalating healthcare costs
* **Years 4-5**: Some tax benefits expire, full healthcare cost impact
* **Aging Parent Factor**: Based on parent health status + location + current Medicare/Medicaid status

**Aging Parent Cost Projections:**

* **Low Risk**: $500-$1,500 additional annual support needed
* **Medium Risk**: $1,500-$4,000 additional annual support needed
* **High Risk**: $4,000-$8,000+ additional annual support needed

Risk factors include: rural location, dual Medicaid eligibility, chronic conditions, low parent income.

**Output Format:**

* **Current Year Net Impact**: $X,XXX
* **3-Year Cumulative Impact**: $X,XXX
* **5-Year Cumulative Impact**: $X,XXX
* **Aging Parent Support Projection**: $X,XXX over 5 years
* **Total Net Financial Impact**: $X,XXX

# "Your AI-Powered Career Advancement Blueprint"

## Complete Assessment for Personalized Career Growth Strategy

**Introduction:** This comprehensive assessment analyzes your current career position, identifies optimal advancement paths, and creates a personalized development plan to accelerate your income growth. Based on data from thousands of successful career transitions, our AI will map your fastest route to your income goals.

## Section 1: Current Position Analysis (5 minutes)

### Question 1: Professional Identity

**What is your current job title?** (This helps us map your starting point)

* [ ] Administrative/Support Role
* [ ] Individual Contributor (Analyst, Developer, Specialist, etc.)
* [ ] Team Lead/Senior Individual Contributor
* [ ] Manager/Supervisor
* [ ] Director/Senior Manager
* [ ] Executive/C-Level
* [ ] Entrepreneur/Business Owner
* [ ] Currently Between Jobs
* [ ] Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Question 2: Industry Classification

**Which industry best describes your current or target field?**

* [ ] Technology (Software, IT, Tech Services)
* [ ] Finance & Banking (Investment, Corporate Finance, Insurance)
* [ ] Healthcare (Clinical, Administrative, Pharmaceutical)
* [ ] Consulting (Management, Strategy, Operations)
* [ ] Marketing & Sales (Digital Marketing, Business Development)
* [ ] Education (K-12, Higher Education, Training)
* [ ] Government & Public Sector
* [ ] Non-Profit & Social Services
* [ ] Media & Communications
* [ ] Real Estate & Construction
* [ ] Retail & Consumer Goods
* [ ] Manufacturing & Operations
* [ ] Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Question 3: Experience Timeline

**How many years of professional experience do you have?**

* [ ] Less than 1 year
* [ ] 1-2 years
* [ ] 3-5 years
* [ ] 6-8 years
* [ ] 9-12 years
* [ ] 13-15 years
* [ ] 16+ years

**How long have you been in your current role?**

* [ ] Less than 6 months
* [ ] 6 months - 1 year
* [ ] 1-2 years
* [ ] 2-3 years
* [ ] 3-5 years
* [ ] 5+ years

### Question 4: Current Compensation

**What is your current annual salary?** (Used for gap analysis and growth projections)

* [ ] Under $30,000
* [ ] $30,000 - $40,000
* [ ] $40,000 - $50,000
* [ ] $50,000 - $65,000
* [ ] $65,000 - $80,000
* [ ] $80,000 - $100,000
* [ ] $100,000 - $125,000
* [ ] $125,000 - $150,000
* [ ] $150,000+

**Do you receive additional compensation?** (Select all that apply)

* [ ] Annual bonus (typical percentage: \_\_\_%)
* [ ] Stock options/equity
* [ ] Commission
* [ ] Overtime pay
* [ ] Side income/consulting
* [ ] None of the above

### Question 5: Educational Background

**What is your highest level of education?**

* [ ] High School Diploma/GED
* [ ] Some College (no degree)
* [ ] Associate's Degree
* [ ] Bachelor's Degree
* [ ] Master's Degree (MBA, MS, MA, etc.)
* [ ] Professional Degree (JD, MD, etc.)
* [ ] Doctoral Degree (PhD, EdD, etc.)

**Field of study:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Professional certifications you currently hold:** (List all relevant)

## Section 2: Skills Assessment (7 minutes)

### Question 6: Technical Skills Inventory

**Rate your current proficiency in skills relevant to your field** (1=Beginner, 5=Expert)

**Technology Skills:**

* Software Development/Programming: 1 2 3 4 5 N/A
* Data Analysis/Analytics: 1 2 3 4 5 N/A
* Digital Marketing/Social Media: 1 2 3 4 5 N/A
* Project Management Software: 1 2 3 4 5 N/A
* Financial Modeling/Excel: 1 2 3 4 5 N/A
* Database Management: 1 2 3 4 5 N/A
* Design Software (Adobe, etc.): 1 2 3 4 5 N/A

**Business Skills:**

* Financial Analysis: 1 2 3 4 5 N/A
* Strategic Planning: 1 2 3 4 5 N/A
* Sales/Business Development: 1 2 3 4 5 N/A
* Operations Management: 1 2 3 4 5 N/A
* Regulatory Compliance: 1 2 3 4 5 N/A
* Research & Analysis: 1 2 3 4 5 N/A

**What specific technical skills are you strongest in?** (Top 3)

### Question 7: Leadership & Soft Skills Assessment

**Rate your current abilities** (1=Need Development, 5=Strong)

* Team Leadership: 1 2 3 4 5
* Public Speaking/Presentations: 1 2 3 4 5
* Written Communication: 1 2 3 4 5
* Negotiation: 1 2 3 4 5
* Conflict Resolution: 1 2 3 4 5
* Strategic Thinking: 1 2 3 4 5
* Emotional Intelligence: 1 2 3 4 5
* Networking/Relationship Building: 1 2 3 4 5
* Time Management: 1 2 3 4 5
* Problem-Solving: 1 2 3 4 5

### Question 8: Management Experience

**How many people do you currently manage directly?**

* [ ] 0 (Individual contributor)
* [ ] 1-2 people
* [ ] 3-5 people
* [ ] 6-10 people
* [ ] 11-20 people
* [ ] 20+ people

**How many people report to you indirectly (through other managers)?**

* [ ] 0
* [ ] 1-5
* [ ] 6-15
* [ ] 16-30
* [ ] 30+

**Have you ever managed a budget? If yes, what size?**

* [ ] No budget management experience
* [ ] Under $50,000
* [ ] $50,000 - $250,000
* [ ] $250,000 - $1 million
* [ ] $1 million+

## Section 3: Career Goals & Aspirations (4 minutes)

### Question 9: Income Objectives

**What is your target annual salary within the next 3-5 years?**

* [ ] $50,000 - $65,000
* [ ] $65,000 - $80,000
* [ ] $80,000 - $100,000
* [ ] $100,000 - $125,000
* [ ] $125,000 - $150,000
* [ ] $150,000 - $200,000
* [ ] $200,000+

**What is your ultimate career income goal?** (No timeline pressure)

* [ ] $75,000 - $100,000
* [ ] $100,000 - $150,000
* [ ] $150,000 - $200,000
* [ ] $200,000 - $300,000
* [ ] $300,000 - $500,000
* [ ] $500,000+

### Question 10: Career Path Preferences

**Which career advancement path appeals to you most?**

* [ ] Individual Contributor Track (Senior Specialist, Principal, Expert)
* [ ] Management Track (Team Lead → Manager → Director → VP)
* [ ] Entrepreneurial Track (Start my own business/consulting)
* [ ] Hybrid Track (Leadership + deep expertise)
* [ ] I'm not sure yet

**What type of role would you most like to have in 5 years?**

* [ ] Senior specialist in my current field
* [ ] Team leader with 3-8 direct reports
* [ ] Department manager with significant responsibility
* [ ] Director/VP with strategic influence
* [ ] C-level executive
* [ ] Independent consultant/business owner
* [ ] Career change to different industry

### Question 11: Timeline & Urgency

**How quickly do you want to achieve your next career advancement?**

* [ ] Within 6 months
* [ ] Within 1 year
* [ ] Within 2 years
* [ ] Within 3-5 years
* [ ] I'm focused on long-term growth

**What's driving your career advancement timeline?** (Select all that apply)

* [ ] Financial pressure/needs
* [ ] Boredom/lack of challenge in current role
* [ ] Limited growth opportunities at current company
* [ ] Family/life changes requiring higher income
* [ ] Competitive career goals
* [ ] Industry changes requiring adaptation
* [ ] Personal fulfillment and growth

## Section 4: Constraints & Resources (3 minutes)

### Question 12: Geographic & Lifestyle Preferences

**Are you willing to relocate for career advancement?**

* [ ] Yes, anywhere in the US
* [ ] Yes, within my current region/state
* [ ] Yes, to specific cities (list): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* [ ] Only for the right opportunity
* [ ] No, must stay in current area

**How important is work-life balance to you?**

* [ ] Extremely important - won't sacrifice for career growth
* [ ] Very important - limited overtime/travel acceptable
* [ ] Moderately important - willing to work extra for advancement
* [ ] Less important - career growth is top priority
* [ ] Not important - will work whatever it takes

**Are you open to remote work or hybrid arrangements?**

* [ ] Prefer fully remote
* [ ] Prefer hybrid (2-3 days in office)
* [ ] Prefer mostly in-office with some remote flexibility
* [ ] Prefer fully in-office
* [ ] No preference

### Question 13: Learning Capacity & Investment

**How many hours per week can you realistically dedicate to skill development?**

* [ ] 1-2 hours
* [ ] 3-5 hours
* [ ] 6-10 hours
* [ ] 11-15 hours
* [ ] 15+ hours

**What's your annual budget for professional development?**

* [ ] Under $500
* [ ] $500 - $1,500
* [ ] $1,500 - $3,000
* [ ] $3,000 - $5,000
* [ ] $5,000+
* [ ] My employer covers most development costs

**What's your preferred learning style?** (Select all that apply)

* [ ] Online courses/videos
* [ ] In-person workshops/conferences
* [ ] Books and written materials
* [ ] Mentorship/coaching
* [ ] Hands-on project experience
* [ ] Peer learning/study groups
* [ ] Formal degree programs

### Question 14: Network & Support System

**How would you rate your professional network?**

* [ ] Very strong - I know senior people in my target roles
* [ ] Good - I have some connections who could help
* [ ] Moderate - I know peers but few senior contacts
* [ ] Limited - mostly internal company connections
* [ ] Weak - I need to build my network from scratch

**Do you currently have a mentor or career coach?**

* [ ] Yes, formal mentor relationship
* [ ] Yes, informal mentor/advisor
* [ ] No, but I'm actively seeking one
* [ ] No, but I'm open to mentorship
* [ ] No, I prefer to figure things out myself

**How comfortable are you with networking and self-promotion?**

* [ ] Very comfortable - I actively network and promote my achievements
* [ ] Somewhat comfortable - I can do it when needed
* [ ] Neutral - I'll network for specific goals
* [ ] Uncomfortable - I struggle with self-promotion
* [ ] Very uncomfortable - I avoid networking situations

## Section 5: Performance & Motivation (2 minutes)

### Question 15: Current Performance Indicators

**How would you rate your performance in your current role?**

* [ ] Exceeds expectations consistently
* [ ] Above average performance
* [ ] Meets expectations reliably
* [ ] Inconsistent performance
* [ ] Below expectations

**Have you received any recognition in the past 2 years?** (Select all that apply)

* [ ] Promotion
* [ ] Significant raise (10%+)
* [ ] Performance bonus
* [ ] Awards/recognition
* [ ] Additional responsibilities
* [ ] Special projects/leadership opportunities
* [ ] None of the above

### Question 16: Learning Aptitude

**How quickly do you typically master new skills or technologies?**

* [ ] Very quickly - I pick up new things faster than most
* [ ] Quickly - I learn at an above-average pace
* [ ] Average - I learn at a typical pace with effort
* [ ] Slowly but thoroughly - I take time but master things well
* [ ] I struggle with learning new technical skills

**What motivates you most in your career?** (Rank top 3: 1=Most Important)

* [ ] Financial compensation and security \_\_\_
* [ ] Intellectual challenge and growth \_\_\_
* [ ] Leadership and influence \_\_\_
* [ ] Work-life balance and flexibility \_\_\_
* [ ] Making a positive impact \_\_\_
* [ ] Recognition and status \_\_\_
* [ ] Autonomy and independence \_\_\_
* [ ] Stability and predictability \_\_\_

## Section 6: Final Details (1 minute)

### Question 17: Risk Tolerance

**How comfortable are you with career risk?**

* [ ] High risk tolerance - willing to make bold moves
* [ ] Moderate risk tolerance - calculated risks are fine
* [ ] Low risk tolerance - prefer safe, incremental progress
* [ ] Risk averse - stability is most important

### Question 18: Additional Context

**What's the biggest obstacle to your career advancement right now?**

* [ ] Lack of relevant skills/qualifications
* [ ] Limited opportunities at current company
* [ ] Insufficient network/connections
* [ ] Geographic/location constraints
* [ ] Work-life balance requirements
* [ ] Financial constraints for development
* [ ] Unclear career direction
* [ ] Discrimination or bias in advancement
* [ ] Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Is there anything specific about your career situation we should know?** (Optional)

## Your Contact Information

**To receive your personalized AI Career Advancement Blueprint:**

* **Email:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **First Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Phone:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Optional)
* **LinkedIn Profile:** \_\_\_\_\_\_\_\_\_\_\_ (Optional)

## What You'll Receive:

✅ **Personalized Career Advancement Score** (0-100 with detailed breakdown) ✅ **3 Optimal Career Paths** with specific role progression and timelines ✅ **Skill Gap Analysis** with prioritized development recommendations ✅ **Income Growth Projections** for each career path over 5 years ✅ **90-Day Action Plan** with specific, measurable milestones ✅ **Monthly Career Development Newsletter** with industry-specific insights

This assessment takes approximately 12-15 minutes to complete thoroughly. Your responses are confidential and used only to generate your personalized career advancement strategy. The more detailed your responses, the more accurate and valuable your personalized blueprint will be.

## Calculation Inputs Summary:

**This questionnaire captures all required inputs for:**

* Current position analysis (role, skills, experience, industry)
* Optimal path identification (goals, timeline, constraints)
* Skill gap calculation (current vs. target capabilities)
* Time-to-goal estimation (learning capacity, aptitude, availability)
* Income growth projection (performance, career path, timeline)
* Development plan generation (resources, preferences, budget)