1. **Question: What is your level of depth in managing your finances today? Mark the corresponding options.**
   * Record only income and expenses.
   * Plan how much I intend to spend and receive during the year.
   * Analyze how much I intend to spend and receive during the year and whether it is compatible with my short, medium, and long-term goals.
   * Conduct a study to identify, eliminate, reduce or outsource the risks in my financial life.
   * Seek ways to optimize taxation in my financial life.
   * Manage my investment portfolio to align with my financial goals.
   * Plan the succession of my assets to make it as easy, cheap, and safe as possible.
   * I don't do any of this and think I don't need to.
   * I don't do any of this, but understand that I should.
2. **Question: What would lead you to hire a personal Financial Planning service? Mark up to four options.**
   * I cannot save.
   * I worry about the personal financial risks to which I am exposed.
   * I want to start investing.
   * I invest without a strategy. Therefore, I am interested in seeking the best risk/return ratio in the context of my life goals.
   * I think I could be paying fewer legal taxes.
   * I don't know how much I need to save for my retirement.
   * I don't know how to make a cheap, simple, and safe succession.
   * I am not interested in a personal Financial Planning service.
3. **Question: Which of these aspects do you value most when deciding to hire Financial Planning? Mark up to three options.**
   * Price
   * Quality
   * Company's name in the market.
   * Family recommendations.
   * Recommendations from experienced digital influencers on the subject.
   * Company philosophy (e.g., social agendas, sustainable actions, etc.)
   * Scope of planning (what the planning offers).
4. **Question: Considering the definitions of the areas of personal Financial Planning, which of the options do you believe you need the most?**
   * Financial Management: The central point is to deeply diagnose the client's current situation in material and psychological terms.
   * Risk Management: Brings strategies through the use of insurance to manage financial exposure.
   * Tax Planning: Strategies and techniques to maximize the present value of the client's assets after the effect of taxes.
   * Retirement Planning: The main goal is to develop strategies to maximize the capital to be used in retirement.
   * Succession Planning: Proposes strategies and techniques to deal with the reservation and distribution of accumulated assets.
5. **Question: What value are you willing to pay for Financial Planning?**
   * R$1.000,00 to R$2.000,00
   * R$2.000,00 to R$4.000,00
   * R$4.000,00 to R$6.000,00
   * R$6.000,00 to R$8.000,00
   * Above R$8.000,00
   * Not willing to pay for Personal Financial Planning.
6. **Question: In the scope of personal Financial Planning, rare are the cases where the client is not responsible for implementing most of the developed solutions. With this in mind, how willing are you to learn about your Financial Plan enough to understand and execute it more easily and confidently?**
   * Highly willing.
   * Moderately willing.
   * Only what is strictly necessary.
   * Would trust the recommendations and act with confidence, even without fully understanding them.
7. **Question: What is your willingness to acquire the products below if necessary for the proper functioning of your personal Financial Plan?**
   * Consortium
   * Financing
   * Insurance
   * Investment products
   * Investment service
   * Others