





Actions

My Big Picture

What I'm after, why I'm after it, and how I'll go about acheiving that.

Goals

Touchstones

Pathways

Outcomes & Aspirations

Beliefs & Motivations

Strategies & Action Plans

All Approved In-Progress Notes

Financial Planning Priorities Last updated 3 days ago

Highest Priority Planning Topics

Dreams & Ambitions

Leisure Time with Loved Ones

Manage Debts or Liabilities

Protecting Assets or Income

Protecting Assets or Income

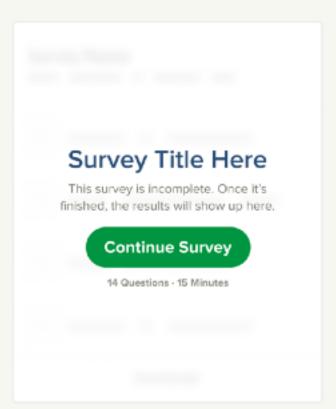
Misc. Notes

Last updated 3 days ago

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by Cody Peterson on 03/31/2017 at 10:03pm

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Custom Simple Data Table Last updated 3 days ago

Date of Birth	October 10, 1984
Age	32
Children	John and Kim
Income	\$120,000
Net Worth	\$800,000
Annual Savings	\$10,000
Life Insurance	\$2,000,000
Date of Birth	October 10, 1984

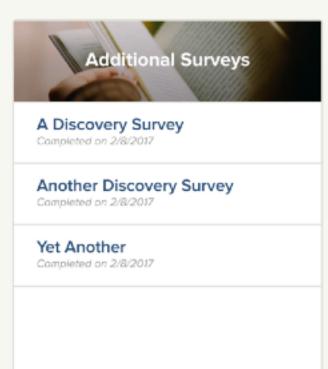
New Home Last updated 3 days ago Beliefs

When purchasing a new home, I prefer to put down as much cash as possible (given other needs) and minimize the loan amount.

If/when a new home is purchased, it will be because we plan on having more children and will need a larger home, nulla vitae elit libero, a pharetra augue, duis mollis, est non commodo luctus, nisi erat porttitor ligula, eget lacinia odio sem nec elit..

Desired Outcome

When purchasing a new home, I prefer to put down as









Matthew Wells is working towards retirment, being nice to his wife, and helping his kids.

(Actions →

Oct 10th, 1954 (63) — Edit Status

Big Picture Surveys Activity



My Financial Goals, Beliefs, & Strategies

Based on your responses to seven completed surveys.



Giving to Family

Regarding Giving to Family, my goal is to support my children financially until they turn/ed a certain age, after that they're on their own. Behind the goals and aspirations you have about your money.

1 Goal - 2 Beliefs - 4 Strategies



Investment Philosophy

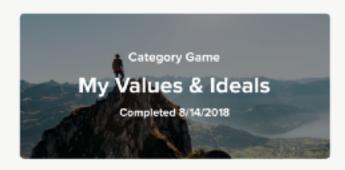
We think that good financial advising comes from really knowing our clients. Understanding the Why and the How behind the goals and aspirations you have about your money and your life will help keep you on track as life.

3 Goals – 5 Beliefs – 2 Strategies

Show All

Ready to share more? View open surveys +

Additional Insights & Information







Note Group
Family Notes
Edited 7/14/2018

Add/Send Survey(s)

New Note Group

Clients Surveys Notification Your Company Name







Your Company Name









Actions ▼

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Goals Outcomes & Aspirations Touchstones

Beliefs & Motivations

Pathways Strategies & Action Plans

All Approved In-Progress Notes



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Misc. Notes

Last updated 3 days ago

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New Home -Additional Surveys

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Desired Outcome

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Survey Title Here

This survey is incomplete. Once it's

finished, the results will show up here.

Continue Survey

14 Questions - 15 Minutes

Another Discovery Survey Yet Another Completed on 2/8/2017



Matthew Wells is working towards retirment, being nice to his wife, and helping his kids.

Actions -

Oct 10th, 1954 (63) - Edit Status

Big Picture Surveys Activity



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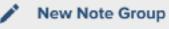






Note Group Family Notes Edited 7/14/2018





Company Clients Surveys Notifications











✓ Completed: Nov 12th 2018 - 39 Questions

Initial Client Discovery Survey With a Fairly Long Title

Our Initial Client Discovery survey will quickly uncover what is important to you and which planning areas warrant a deeper dive. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore.

Download Survey Edit Responses View Your Profile Contact Advisor

Your Summary | Edit

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Survey Overview -

Well being is the state of being comfortable, healthy and happy. It is something to strive towards. Awareness of one's satisfaction level in a particular aspect of your life is the first step towards achieving your goals and aspirations.

On a scale from 1-7 with Completely Dissatisfied being a 1 and Completely Satisfied being a 7, how satisfied are you in the following aspects of your life and/or wealth?

Survey Insights -

The average financial assets at retirement is only \$125,000 but this number is skewed by high net worth people. Most people will retire with less than \$75,000 in financial assets. Link to response