



✓ 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.

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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](#)

You might consider a **\$29 college prepaid plan**. The advantage is that you can buy tuition credits at a college in your state at current tuition rates. [Link to response](#)

Your Responses

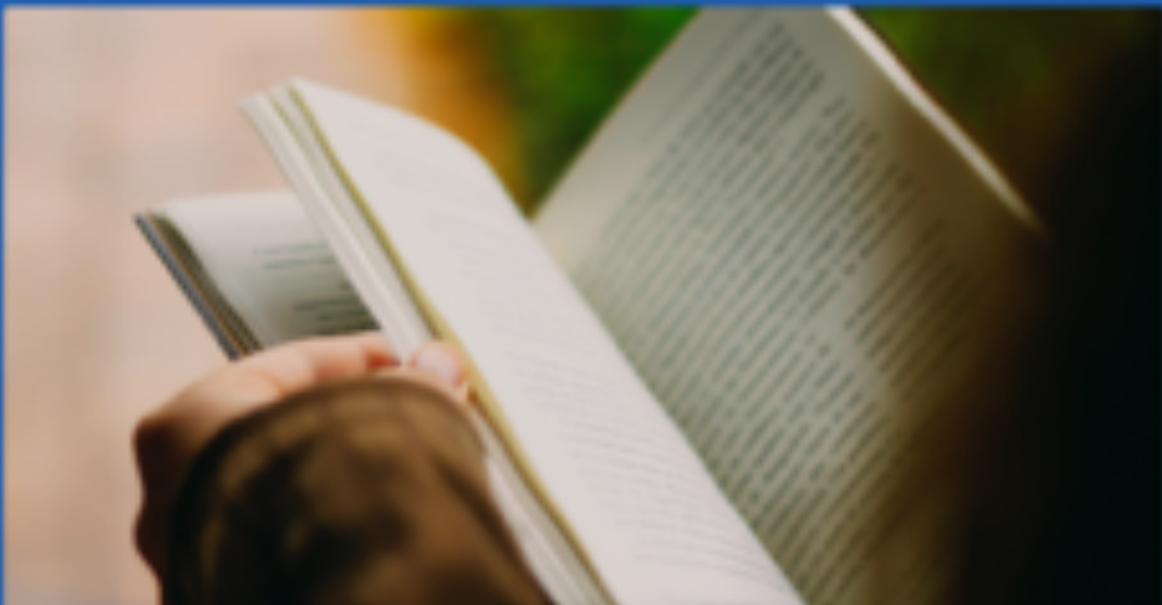
View scales in ascending order ▾

- 01 Are you currently employed/working? No
- 02 What age did you retire or what age would you like to retire? 68
- 03 Please tell us about what type of work you do/did. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- 04 Please tell us what you most enjoy(ed) and dislike(d) about your work? Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
- 05 Personal Financial Management

Very Dissatisfied				Neutral				Very Satisfied
1	2	3		4	5	6		7
								7 / 7
								5 / 7
								1 / 7
								5 / 7
								3 / 7
								N / A
								4 / 7
- 06 What age did your spouse/partner retire or what age do they plan to retire? 70
- 07 Please tell us about what type of work your spouse/partner does/did. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- 08 Regarding having money set aside for my future "spending" goals, those beyond basic food and shelter spending, I prefer to... save sporadically, as my finances allow.
- 09 Do you have children? If so, please provide their names and dates of birth in the Commentary box below. No
- 10 I am paying for, or plan to pay for 5 (number of) private elementary, middle or high school educations.
- 11 I am paying for, or plan to pay for 3 (number of) college educations.
- 12 I expect to spend money on the following items at some point in the future: Vehicles/Transportation
- 13 Regarding get aways or vacations, I... typically plan ahead and am generally able to pay cash or pay off credit card when due.

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