



Matthew Wells

Oct 10th, 1984 (33)

Actions



My Big Picture

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

Goals

Outcomes & Aspirations

Touchstones

Beliefs & Motivations

Pathways

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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Survey Title Here

This survey is incomplete. Once it's finished, the results will show up here.

Continue Survey

14 Questions - 15 Minutes

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*

Additional Surveys

A Discovery Survey

Completed on 2/8/2017

Another Discovery Survey

Completed on 2/8/2017

Yet Another

Completed on 2/8/2017



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

Oct 10th, 1954 (63) — [Edit Status](#)

Actions

[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

Category Game
My Values & Ideals
 Completed 8/14/2018

Discovery Survey
Financial Life Satisfaction Checkup
 Completed 7/14/2018

Discovery Survey
Initial Client Discovery
 Completed 7/14/2018

Note Group
Family Notes
 Edited 7/14/2018

Add/Send Survey(s)

New Note Group



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Big Picture Surveys Activity



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Show All

Ready to share more? [View open surveys](#) →

Additional Insights & Information



Category Game

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Discovery Survey

Financial Life Satisfaction Checkup

Completed 7/14/2018



Discovery Survey

Initial Client Discovery

Completed 7/14/2018

Note Group

Family Notes

Edited 7/14/2018

Add/Send Survey(s)

New Note Group



Sarah Martin



✓ 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?

2 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](#)