

**Client screens.**



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 libera, 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