



The Confident Progress Index™

For: _____

Meeting Date: _____

We are looking forward to our first meeting with you! So that we can make this meeting as beneficial for you as possible, could you please take a few minutes to answer this brief questionnaire and get it to us prior to the meeting? (If time doesn't permit, please bring it with you.) Basically we want to get an overview of your planning to date and your major areas of concern that prompted this meeting.

How has your situation changed over the past couple of years?	What are the top things that you would like to discuss with us? What are your major goals?
Family	
Income	
Health	
Career	
Possessions	
Other	

Over, Please

In general over the past two years...	Yes	No	Not Sure	Comments
Goals. Do you know if you are on target to meet your major goals?				
Cash Flow				
Have you been comfortable with your cash flow and standard of living?				
Are you supporting an adult child, college student, or parent?				
Are you saving for your children's college expenses?				
Do you have any outstanding short-term debts, such as credit cards, auto loans, etc.?				
Investments				
Do you have an investment professional managing your money?				
Were you comfortable with the volatility and performance of your portfolios?				
Do you have questions about the reporting, management, and holdings of your investments?				
Tax Planning				
Do you believe you are getting the help you need to keep your tax bill under control?				
Estate Planning				
Do your will, living trust, and advance directive currently reflect your wishes and family situation?				
Have your assets been properly retitled to reflect this planning?				
Have you reviewed the beneficiary designations on your retirement plan accounts?				
Risk Management				
Have you met with your property and casualty insurance professional to update your homeowners, auto, and liability umbrella policies?				
Have you reviewed the amount of your life insurance coverage, its ownership and beneficiary designations?				
Have you acquired a long-term care policy or have you reviewed one that you currently own?				

Thanks! We look forward to meeting with you!