The Confident Progress Client Update™

For: ____

Meeting Date: ____

We want to make sure that your update meeting covers important planning topics and what is on your mind. So that we can be better prepared to 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? ***Also, could you provide us with an updated balance sheet (or account statements) reflecting the assets not handled by us?***

How has your situation changed since we last met?	What are the top things that you would like to discuss with us?
Family	
Income	
Health	
Career	
Possessions	
Other	

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Since we last met…	Yes	No	Not Sure	Comments
Cash Flow				
Have you been comfortable with your cash flow and standard of living?				
Have you supported an adult child or parent?				
Have you made your desired level of gifts this year?				
Investments				
Were you comfortable with any recent volatility of your portfolios?				
Do you have questions about the management and holdings of your investments with us?				
Goals				
Have you changed your thinking about retirement?				
Have you taken steps toward reaching some of your important life-long goals?				
Have you made progress on your personal non-financial goals?				
Have you considered new goals you would like to discuss with us?				
Tax Planning				
Do you expect your annual income to exceed $200,000 (single) or $250,000 (joint)?				
Do you have any other tax-related questions for us?				
Estate Planning				
Have you met with your attorney to update your will, living trust, and advance directive?				
If not, do those documents currently reflect your wishes?				
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?				

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