



Investia

Financial Services Inc.



Financial Planning Needs Questionnaire

Review meeting preparation-topics for conversation

Review the items below that may have changed since our last meeting. This is designed to make the review meeting as efficient and productive as possible and to make sure that your financial plan is always aligned with your situation.

Check the issues below that you would like to address in our next meeting:

Life Changes: What has changed since our last meeting?

- Work
- Household income
- Household expenses
- Household debt
- Possessions: purchase/sale/loss/gain
- Bank/financial accounts
- Residence(s)
- Health of you and your family
- Marital or family status
- Dependents

Financial Planning and Services Update: How can we help make your goals a reality?

- Your financial plan needs to be updated
- Your loans/mortgage may not be cost effective
- Your insurance coverage may not be appropriate
- Your estate plan needs to be updated
- Your charitable giving strategy needs updating
- Your children/grandchildren's financial needs have changed
- Your investments may be exposed to excessive taxes

Name: _____ **Signature:** _____ **Date:** _____

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