

Aspirations Review Questionnaire

Your Name(s): _____ Today's Date: _____

Envisioning Your Future:

Has anything changed about how you previously envisioned your future and desired lifestyle (for better or worse)?

As you contemplate the future, what are you most excited about?

What concerns you most?

Dream List and Big Anticipated expenses:

Use the chart below to list any large expenses we need to plan for. We may have already discussed these in prior meetings, but our objective is to update the numbers for any changes and for accuracy. These might include, for example, a specific trip or travel in general. It could also be something like "replace my roof". Include the expected date, cost, and recurrence.

<u>What</u>	<u>When</u>	<u>How Much \$</u>	<u>Recurrence</u>

This information is based on assumptions provided by you, the client, and have been unverified. If any of the assumptions are incorrect, you should notify your financial advisor. The information provided by you should be reviewed periodically and updated when either the information or your circumstances change.

Debt and Liability Obligations:

Let's make sure we're on the same page about your current debt obligations (if any). Use the chart below to list any current debts. Do not include credit cards you pay off every month.

<u>What</u>	<u>Total Balance</u>	<u>Avg Monthly Payment</u>	<u>Expected End Date</u>

Living Expenses:

Have your regular monthly expenses changed since our last conversation? If so, let's discuss: on a monthly basis, ASIDE FROM THE DEBT PAYMENTS ABOVE, how much does it cost to maintain your desired lifestyle? _____ If it's helpful, use the chart below to list your average monthly expenses in the following categories.

<u>What</u>	<u>Monthly Expense</u>	<u>Notes</u>
Housing		
Groceries		
Clothing		
Medical / Personal Care		
Utilities		
Insurance (all policies)		
Transportation		
Entertainment		
Travel		
Charity / Gifts		
Dependent Care		
Miscellaneous		

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Is there anything else you'd like to add?

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