

# Client Questionnaire First Session

Read and answer the following questions.

**What do you see yourself accomplishing as a result of our session today?**

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**What are you going to do with the rest of your life?**

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**Success means different things to different people. What is important about success to you?**

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**If you could have anything you wanted, anything at all, what would it be?**

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**What is important about money to you?**

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**If you were hurt or sick, how would you pay your bills?**

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**Make believe your gone and you're looking over the shoulder of your executor, what do you want to see happen?**

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**Have you set goals and designed your retirement to last as long as you live?**

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**If we were having this discussion 3 years down the road, looking back over that period, what has to happen for you to feel good with your progress?**

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