



Dreams • Visions • Goals

Before we build your financial plan, we want to understand what matters most to you. Take your time with these questions.

Instructions: Please take your time answering each question thoughtfully. There are no right or wrong answers — write as much or as little as you like. Your responses help us understand what matters most to you. Press Tab to move between fields.

YOUR PRIORITIES

1 What are you trying to **ACCOMPLISH**? What are your top 2–3 primary goals or priorities?

2 What **KEEPS YOU UP** at night? What is **IMPORTANT** to you?

3 What do you **VALUE** most in life?

- 4 When you think about retirement **5 YEARS** from now, what do you envision... **FINANCIALLY?**
PERSONALLY?

- 5 What are you most **PASSIONATE** about? Any charitable intentions?

YOUR PEOPLE & PROTECTION

- 6 Who are the **PEOPLE** that are affected by the **FINANCIAL DECISIONS** you make?

- 7 What plans have you made in the event you become **DISABLED** or **UNEXPECTEDLY PASS AWAY**?

YOUR PERSPECTIVE

- 8 If we **DO NOT** develop a financial plan, what is the likely **OUTCOME** if you keep doing what you are doing now?

9 What **MUST** happen for you to consider yourself **SUCCESSFUL**?

10 What do you see as the impact of **ACTION** vs. **INACTION**?

YOUR EXPERIENCE

11 What did you **LIKE** or **DISLIKE** about advisors that you have worked with in the past?

12 What is **REALLY IMPORTANT** to you that we did not discuss today?



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Dreams, Visions & Goals Worksheet | v2.0 | April 2026