

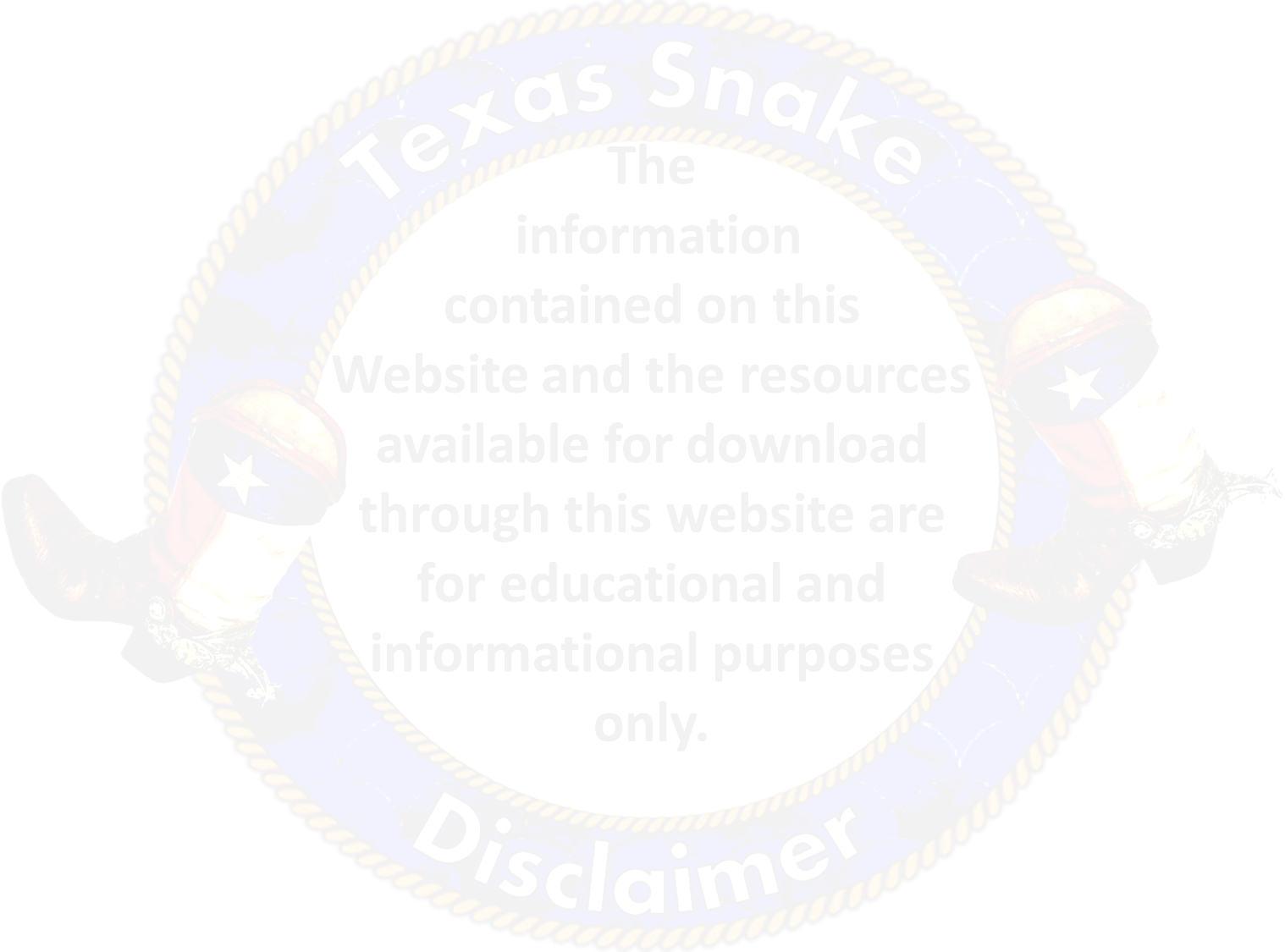
[FinancialPlanningQuestionnaire](https://www.mmbb.org/docs/FinancialPlanningQuestionnaire.pdf)

USE THIS LINK

<https://docs.google.com/document/d/1q1h9_WjSI-uUSQCgGd9m5vm5cgTYD1Kre_G_MC5c100/edit?usp=sharing>

<https://www.mmbb.org/docs/FinancialPlanningQuestionnaire.pdf>

THIS LINK THE COMPANY HAS CHANGED YET LEGALLY WE NEEDED TO PUT WHERE IT CAME FROM. Top link works

In order to begin a well thought out investment road map it is necessary to identify where you are in several categories, namely your present circumstance as to age, family circumstances and obligations, years remaining to work if not already retired, goals and objectives as well as risk reward tolerances or ratios. The following link will contain a 7 page questionnaire that everyone planning on partaking in this exercise needs to complete and save even though for many of us dollar amounts should be immeasurably improved soon it is the other areas of these questions that will identify your tolerance to risk as well as an expected return on investment. The completed survey will be yours with no others able to view however once these 7 pages are complete you will be miles ahead as far as when you meet with a

A wealth manager or planner very little asks if you will be new territory as well as being in a stronger position to judge the knowledge and expertise of the individual wanting to get you as a client.

