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PROTECTING YOUR FINANCIAL FUTURE WORKSHEET 1

A DIVORCE, WIDOWED, RETIREMENT & INHERITANCE PRIMER

When It's Time To Invest In Your-Self!

Please complete this worksheet and then either Fax, mail or scan/attach your completed worksheet to an email addressed confidentially to Matt: Matt@MPClements.com

1. WHAT IS YOUR CURRENT SITUATION?

(place "X" in appropriate left column)

<input type="checkbox"/>	* Considering Divorce
<input type="checkbox"/>	* Into Divorce Process
<input type="checkbox"/>	* Recently Divorced or Widowed
<input type="checkbox"/>	* Retiring
<input type="checkbox"/>	* Inheriting
<input type="checkbox"/>	* Other (specify):

2. WHAT ARE YOUR PRIMARY CONCERNS AT THIS TIME?

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3. HOW DO YOU RATE YOUR WELL-BEING IN EACH AREA OF YOUR LIFE CURRENTLY?	
(using a scale from 1-5) 1=Crisis 2=Weak 3= OK 4=Good 5=Excellent	
	* Mental and Emotional Wellness
	* Sense of Spiritual Connection or Meaning
	* Financial Security
	* Meaningful Life Direction
	* Physical Wellness (weight, diet, exercise)
	* Support of Family and/or Friends
	* Job /Career Satisfaction
	* Overall Satisfaction with my Life

4. IN WHAT AREAS MAY YOU WISH OUR HELP OR ADVICE?	
(CHECK ALL that apply)	
	* Getting a good picture of where I'm at financially and how much capital I will need invested /secured to live on (especially pertinent during divorce settlement negotiation)
	* Getting a financial handle and protection plan in place and managed (especially post divorce/widowed, inheritance/retirement)
	* Getting a second opinion of my current portfolio or plan (review, recommendations, and opportunities to strengthen my assets)
	* Other (please specify):

5. PLEASE PROVIDE PERTINENT DETAILS	
(Please write/type in your reply in the left column for each question below to help expedite)	
	* Length of Marriage (in years)
	* Your approximate total annual household net worth
	* Your settlement (approx) annual individual net worth (if you know)
	* Do you currently have a professional financial advisor?
	* Do you have an up to date financial plan tied to specific goals, needs, and short/long term values?
	* Would you like a FREE review (or second opinion with review and recommendations) of your current financial plan or investments?
	* Would you like a free 30-minute consultation to discuss your situation and see what advice we may be able to give?

6. WHAT IS MOST IMPORTANT TO YOU IN LIFE? (i.e., What Values do you hold most dear?)

7. IF WE MET ONE YEAR FROM TODAY, WHAT WOULD HAVE HAD TO HAVE HAPPENED IN YOUR WORLD, TO CONSIDER THAT YEAR A SUCCESS? (please consider all areas of life: health, diet, exercise, career, finances, relationship, mental/emotional state etc. ... AND then be as specific as possible!)

8. WHAT INFORMATION WOULD YOU LIKE?

(Please CHECK ALL that apply)

	I would like you to contact me asap to discuss
	I would like a FREE 30-min consultation and/or review of my Financial plan /portfolio / investments
	I would like to be added to your VIP Newsletter for information about upcoming retreats, events, and offerings
	I would like a package of your company background, capabilities and offerings sent me
	Other (Please specify):

9. CONTACT INFORMATION

(Please be sure to fill this our so we know what your interests are and HOW to reach you!)

Your Name	
Phone Number	
Primary Email	
Mailing Address	

10. ADDITIONAL COMMENTS OR QUESTIONS?

Thank You!

I look forward to seeing where we may help you to live your full vision