Dreams & Goals Form 2 a/b

Name   **Date**

We are asking this information to identify what your priorities are. We need to know this information in order to provide a comprehensive consultation.

Prioritize the 3 most important areas from the following:

#1   #2   #3

What are the main priorities in your Personal Life?

What are the main priorities in your Family Life?

Financial Priorities: Please Detail (ie: 0-1 Year: Buy $6000 RSP, repay $4000 visa ect.).

0-1 Year

1-3 Year

3-20 Year

Retirement Date: mm/dd/yy   Estimated spendable income in   How many years do you
                                   todays economy ($/year)   plan to live?

Professional/Career Life Priorities?

Priorities for Travel/Adventure?

Other Priorities?

MY BEHAVIOUR AS AN INVESTOR

1. My Investment decisions are well thought out:

Always   Most of the time   Sometimes   Seldom

2. If I were to receive a "hot tip" about an investment, my reaction would be to:

Jump in   Check it out further   Ignore it

3. I have had **success** as an investor in
(check all that are applicable)

Bank Account

Insurance

Government Bonds

Blue Chip Stock

Commodities/Precious Metals

Own Business

Other

Term Deposit / GIC

Canada Savings Bond

Corporate Bonds

Penny Stocks

Collectibles

Real Estate

4. I have been **unhappy** as an investor in
(check all that are applicable)

Bank Account

Insurance

Government Bonds

Blue Chip Stock

Commodities/Precious Metals

Own Business

Other

Term Deposit / GIC

Canada Savings Bond

Corporate Bonds

Penny Stock

Collectibles

Real Estate

5. My family and friends are aware of my investment successes:

Certainly   Probably   Perhaps   I doubt it

6. My family and friends are aware of my investment failures:

Certainly   Probably   Perhaps   I doubt it

7. My current investments are part of a specific planned strategy:

Of course   More or Less   Seldomly

8. I think about my investments:

Every day   Once a week   Occasionally   Only if I have to

9. I read the financial section of the newspaper

Every day   Once a week   Occasionally   Only if I have to

10. I consider my knowledge as an investor to be:

Expert   Above average   As good as most   Needs a lot of work