

# 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 todays economy (\$/year)

How many years do you 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