Vision Wealth Management Inc.

*Getting To Know You*

*“Helping people connect their money with their purpose”.*

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What prompted you to contact us?

What types of investing have you done up to now?

What worked well and didn’t?

What amount do you have to invest currently & in the future?

Are you anticipating any life style changes (Retirement/Inheritance/Sale of Real Estate or business)?

What is the purpose of your money and how does it fit in with your life?

What is the vision for your future?

What do you value the most in life?

What do we need to know about you?

*“Good Fortune is what happens when opportunity meets with planning” - Thomas Edison*

*Securities offered through LPL Financial, Member FINRA/SIPC*