

Goal Profile Affirmation

Wednesday, March 1, 2017

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Smith Family

The Goal Profile Affirmation Report confirms or authenticates the goals you would like to accomplish through planning.

This knowledge offers a unique opportunity to shape your financial objectives around your goals, while at the same time highlighting your greatest priorities. This report will ultimately serve as a guide for future planning decisions.

Please confirm that we have accurately identified the goals that will be the current focus of our work together by putting an "A" in the box for "Agree" or a "D" for "Disagree" if we need to further tune, adjust or change the goal. Then please initial and date at the end of the report.

Goal: Financial Independence

A/D

To develop a good financial plan that is regularly monitored and updated

Goal: Asset Allocation

A/D

To develop, execute and maintain a good investment strategy

Goal: Family Legacy

A/D

To pass as many of our assets onto our children and future grandchildren as possible. We especially would like to help fund our future grandchildren's educations if possible

Joe Smith and Lynne Smith (Signature): _____ Date: _____