

# The Blueprint Report Card

Submit To:

Client Name(s):

Telephone:

E-mail Address:

To help you clearly understand your current situation, try The Blueprint Report Card.

Rate your reactions to each pair of phrases. Decide where you lie on the scale (1-10). Your responses will be totalled and rated with our financial report card.

I have not set any clear goals for my financial future.		I have set some clear goals for my financial future.
I do not have a strategic financial plan in place.		I have a strategic financial plan in place.
I am not confident that I will have sufficient funds at retirement.		I am confident that I will have sufficient funds at retirement.
I am not confident that in the event of my untimely death, that my family will be financially okay.		I am confident that in the event of my untimely death, my family will be financially okay.
In the event of a medical condition, I do not have the financial resources readily available to seek out the best treatment in the world.		In the event of a medical condition, I have the financial resources readily available to seek out the best treatment in the world.
I am not confident that if I became disabled for a period of time, my coverage is adequate and our lifestyle would not suffer greatly.		I am confident that if I became disabled for a period of time, my coverage is adequate and our lifestyle would not suffer.
I am not confident that I have prepared well for my child's education plans.		I am confident that I have prepared well for my child's education plans.
I do not budget my cash flow well and find it difficult month to month.		I do budget my cash flow well and do not find it difficult month to month.
I am not confident that my assets will be passed in the most effective way possible to my heirs.		I am confident that my assets will be passed on in the most effective way possible to my heirs.
I am not happy with the financial advice I have received from my other Advisor.		I am happy with the financial advice I have received from my other advisor.