

**CLEMENTS INVESTMENT MANAGEMENT, Inc**

**PROTECTING YOUR FINANCIAL FUTURE WORKSHEET 1**

A DIVORCE, WIDOWED, RETIREMENT & INHERITANCE PRIMER

*When It’s Time To Invest In Your-Self!*

Please complete this worksheet and then either Fax, mail or attach your completed word.doc to an email addressed confidentially to Matt@MPClements.com

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| **1.** | **WHAT IS YOUR CURRENT SITUATION?****(place “X” in appropriate left column)** |
|  | \* Considering Divorce  |
|  | \* Into Divorce Process  |
|  | \* Recently Divorced or Widowed |
|  | \* Retiring  |
|  | \* Inheriting |
|  | \* Other (specify):  |

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| **2.** | **WHAT ARE YOUR PRIMARY CONCERNS AT THIS TIME?** |
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| **3.** | **HOW DO YOU RATE YOUR WELL-BEING IN EACH AREA OF YOUR LIFE CURRENTLY?****(using a scale from 1-5) 1=Crisis 2=Weak 3= OK 4=Good 5=Excellent** |
|  | \* Mental and Emotional Wellness |
|  | \* Sense of Spiritual Connection or Meaning |
|  | \* Financial Security |
|  | \* Meaningful Life Direction |
|  | \* Physical Wellness (weight, diet, exercise) |
|  | \* Support of Family and/or Friends  |
|  | \* Job /Career Satisfaction |
|  | \* Overall Satisfaction with my Life |

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| **4.** | **IN WHAT AREAS MAY YOU WISH OUR HELP OR ADVICE?****(CHECK ALL that apply)** |
|  | \* Getting a good picture of where I’m at financially and how much capital I will need invested /secured to live on (especially pertinent during divorce settlement negotiation) |
|  | \* Getting a financial handle and protection plan in place and managed (especially post divorce/widowed, inheritance/retirement)  |
|  | \* Getting a second opinion of my current portfolio or plan (review, recommendations, and opportunities to strengthen my assets) |
|  | \* Other (please specify):  |

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|  **5. PLEASE PROVIDE PERTINENT DETAILS**  **(Please write/type in your reply in the left column for each question below to help expedite)** |
|   | \* Length of Marriage (in years) |
|   | \* Your approximate total annual household net worth  |
|  | \* Your settlement (approx) annual individual net worth (if you know) |
|   | \* Do you currently have a professional financial advisor? |
|   | \* Do you have an up to date financial plan tied to specific goals, needs, and short/long term values? |
|  | \* Would you like a FREE review (or second opionion with review and recommendations) of your current financial plan or investments? |
|   | \* Would you like a free 30-minute consultation to discuss your situation and see what advice we may be able to give? |

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| **6.** | **WHAT IS MOST IMPORTANT TO YOU IN LIFE? (i.e., What Values do you hold most dear?)** |
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| **7.** | **IF WE MET ONE YEAR FROM TODAY, WHAT WOULD HAVE HAD TO HAVE HAPPENED IN YOUR WORLD, TO CONSIDER THAT YEAR A SUCCESS? (please consider all areas of life: health, diet, exercise, career, finances, relationship, mental/emotional state etc. … AND then be as specific as possible!)** |
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| **8. WHAT INFORMATION WOULD YOU LIKE?****(Please CHECK ALL that apply)** |
|  | I would like you to contact me asap to discuss |
|  | I would like a FREE 30-min consultation and/or review of my Financial plan /portfolio / investments |
|  | I would like to be added to your VIP Newsletter for information about upcoming retreats, events, and offerings |
|   | I would like a package of your company background, capabilities and offerings sent me |
|  | Other (Please specify): |

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| **9. CONTACT INFORMATION** **(Please be sure to fill this our so we know what your interests are and HOW to reach you!)** |
| Your Name  |  |
| Phone Number  |  |
| Primary Email  |  |
| Mailing Address  |  |

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| **10. ADDITIONAL COMMENTS OR QUESTIONS?** |
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Thank You!

I look forward to seeing where we may help you to live your full vision