

"The future belongs to those who believe in the beauty of their dreams." — Eleanor Roosevelt

# Planning

NORTH GEORGIA   
WEALTH MANAGEMENT GROUP

Financial Life Planning and Wealth Management

81 Crown Mountain Place, A-500 • Dahlonega, GA 30533 • tel 706-864-8631 • fax 706-867-8667  
[www.ngwmg.com](http://www.ngwmg.com) • Securities offered through: LPL Financial Member FINRA/SIPC

Mark each statement below with the level of your agreement with the phrase:

***I am comfortable using debt and credit.***

1- Totally agree    2- Somewhat agree    3- Not sure    4- Disagree    5- Strongly disagree

***The stock market is the best place to make money.***

1- Totally agree    2- Somewhat agree    3- Not sure    4- Disagree    5- Strongly disagree

***People should live on less than what they earn.***

1- Totally agree    2- Somewhat agree    3- Not sure    4- Disagree    5- Strongly disagree

***I have consistently followed the above guideline in my life.***

1- Totally agree    2- Somewhat agree    3- Not sure    4- Disagree    5- Strongly disagree

***I have been tempted at times to make wealth quickly.***

1- Totally agree    2- Somewhat agree    3- Not sure    4- Disagree    5- Strongly disagree

***It is good to splurge at times to help you enjoy life.***

1- Totally agree    2- Somewhat agree    3- Not sure    4- Disagree    5- Strongly disagree

***Becoming wealthy has a lot to do with luck and good fortune.***

1- Totally agree    2- Somewhat agree    3- Not sure    4- Disagree    5- Strongly disagree

***Over time your home is your best investment.***

1- Totally agree    2- Somewhat agree    3- Not sure    4- Disagree    5- Strongly disagree

***Insurance on your life, income, and investments is extremely important.***

1- Totally agree    2- Somewhat agree    3- Not sure    4- Disagree    5- Strongly disagree

***Personalized and trustworthy financial advice is hard to find.***

1- Totally agree    2- Somewhat agree    3- Not sure    4- Disagree    5- Strongly disagree

***There is too much confusion on how financial institutions are being paid.***

1- Totally agree    2- Somewhat agree    3- Not sure    4- Disagree    5- Strongly disagree

**YOUR INVESTMENT PHILOSOPHY STATEMENT**

*What guidelines or rules do you attempt to follow in regards to managing your money and investments?*

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*What experiences have you had with investments that have been productive?*

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*What experiences have you had that have been disappointing?*

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*What investment concepts are you simply not interested in?*

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*What are your expectations of a financial advisor? How much communication would you like?*

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*What are your hesitations about working with an advisor?*

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