



Personal Financial Planning Goals Questionnaire (Optional)

At Alberty Financial, we provide comprehensive planning that prepare you for the milestones and help you navigate uncertain times. We have realized over the years that the clients who receive the maximum benefit from our expertise are those with a clear picture of their goals and dreams. In order to best serve you, we encourage you to fill out this short questionnaire regarding your top goals so that we can make sure to provide a plan that is tailored to your priorities.

1. What are your *priority concerns* about your financial situation? Eg) retirement, debt.

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2. What are your top five *short-term financial goals*? Eg) buy a new car, take a vacation

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3. What are your top five *long-term financial goals*? Eg) retire at 65, pay for children's college

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