



**The Wise Wealth Visioning Exercise™
Questionnaire**

The Wise Wealth Integrator™

Savant Capital Management, Inc.

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Rockford, IL 61107
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The Wise Wealth Visioning Workshop™

Instructions

After completion of form, click the submit button to e-mail data to Savant “or” print off a copy and mail it to us.

Savant Capital Management, Inc
Attn: Client Services
190 Buckley Drive
Rockford, IL 61107

Submit Form
(e-mail data to Savant)

Looking here and now

Date Completed	By Whom	Phone Number	E-mail Address

What are the main reasons you are meeting with us?

Please describe your current situation. What are your greatest concerns? What do you like most about your current situation?

What do you expect to get out of this process?

Looking ahead ten years (cont'd)

What strengths and capabilities do you have that can help you overcome your dangers, capitalize on your opportunities and achieve your ideal vision of the future over the next ten years?

Getting to know you

What are your interests and hobbies?

What organizations do you belong to?

What books, magazines or periodicals do you like to read?

Educational background:

High School

Post-Graduate/Professional

College/University

Area(s) of study

Board/Civic positions:

Getting personal

Please fill in the blanks:

My biggest conflicts around money are with my: (Check one)

1) Parents 2) Children 3) Spouse 4) Other

One dream I've often had that now seems unattainable is to?

After I die I would like to be remembered as:

Imagine it's your 80th birthday party. Ideally, what will your friends and family say about you?

Financial independence

Please fill in the blanks:

What does the term financial independence mean to you personally? How would you define it?

When you become financially independent, what changes would you make that are not already reflected in your present lifestyle?

If you woke up one day and realized you had more money than you could ever spend, what might you do with the excess money?

Do you have any charitable organizations or worthy purpose to which you would seriously consider giving more than \$50,000 of your estate to?

The Wise Wealth Scorecard™

To help you clearly understand your current situation, try *The Wise Wealth Scorecard™*.
Rate your reactions to each pair of phrases. Decide where you lie on the scale from 1 to 10.
Add up your total from each column. Speak to one of our advisors to understand the significance of your score.

	1	2	3	4	5	6	7	8	9	10	
We don't have a clear vision of our future											We have a clear, well-defined vision of our future
We do not have clear financial goals											We have clear financial goals
We don't have a strategy to achieve our personal and financial goals											We have a strategy to achieve our personal and financial goals
We don't have a step-by-step action plan to achieve our goals, both personal and financial											We have a step-by-step action plan to achieve our goals, both personal and financial
Our investments are scattered and disorganized											Our investment portfolio is integrated and organized
We have not reviewed all of the tools which could help us achieve our vision											We have reviewed all of the tools which could help us achieve our vision
We do not review our vision, plan or progress on a regular basis											We review our vision, plan and progress on a regular basis
Our financial advisors work in isolation from each other											Our financial advisors work as a team to help us achieve our vision
We do not have a plan to use our wealth to perpetuate our values											We have a plan to use our wealth to perpetuate our values
We do not have as much confidence in the future as we would like											We have a strong sense of confidence about our future
ADD COLUMN TOTALS											YOUR SCORE _____

Notes

Please add any other notes or thoughts you deem relevant. Also, note any questions you might have.