



ALLISONS FINANCIAL PLANNING
INDEPENDENT FINANCIAL CONSULTANTS & MORTGAGE SPECIALISTS

QUESTIONS TO THINK ABOUT

Our aim at Allisons Financial Planning is to help you achieve your financial goals. Our approach is to help identify the lifestyle you want and work together to get it and keep it. For this reason, it will help both of us get the most out of our meeting if you could spend time thinking about the questions below.

QUESTION	ANSWER
1. What do you hope to gain from our meeting?	
2. Do you have any concerns or issues regarding money at the moment?	
3. What goals do you have that need money and planning to achieve?	
4. Do you currently have a Financial Adviser? Why are you thinking of leaving them?	
5. Are there any questions you want to ask?	