

Financial Needs Assessment

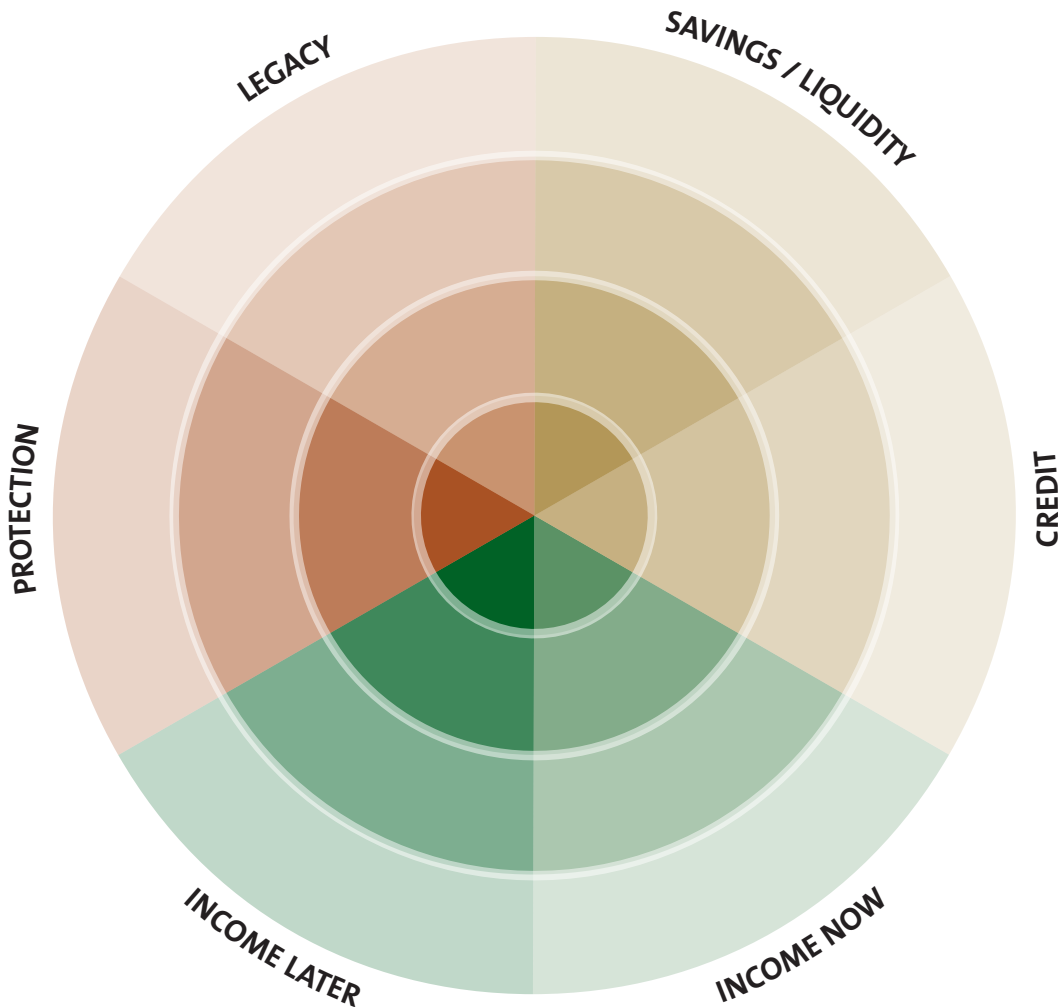
CLIENT NAME: _____ PHONE: _____

The Six Needs of Personal Finance:

Savings and Liquidity, Credit, Income Now, Income Later, Protection, and Legacy

This pie chart lists the six basic personal finance needs that most people will face during certain phases of their lives.

Indicate the degree to which you would like to explore better achievement of these needs by placing a dot in the bullseye for each need. The closer the dot is to the center of the bullseye the more urgent the need is.



NOT A DEPOSIT	NOT FDIC INSURED	NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY	NOT GUARANTEED BY THE BANK	MAY GO DOWN IN VALUE
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