SELF-ASSESSMENT

Financial Planning is such a personal process, that it is vital there be a good fit between you and your planner. Please answer the following honestly with yourself:

1. Do you want to get started planning your life, or your family's success, so that your values, vision and goals are emphasized? Do you want to be clear about where are you are, where you would like to be, and how to get there?

2. Do you want to delegate, *but not abdicate*, your financial planning? You would be the "President" and we your "Vice President of Finance"........................ The enthusiasm of your "Yes" answer is probably directly proportional to our future success together.

3. Are you prepared to put effort into establishing and maintaining the right relationship with your Financial Planner?......................................The enthusiasm of your "Yes" answer is probably directly proportional to our future success together.

4. Do you appreciate a straight-talking, bottom-line approach to your success? ....The enthusiasm of your "Yes" answer is probably directly proportional to our future success together.

5. Is your situation basically under control? Are you responsible, or do you want to become responsible? Are you at peace with yourself? .... "Yes" answers are best.

6. Are you hoping to become fabulously wealthy through life and financial planning? .... (It can help get you organized, focused and planned, but there is nothing fabulous about it.)

7. Do you (a) have available investment resources of at least $250,000? or (b) have at least $50,000 and the ability to save at least $3,500 per month? or (c) some similar combination of resources and savings?.................................Your answer should preferably be "Yes" to any of the above.

We have designed this page to help you determine your fit with Miller Financial Planning. If you feel you have a good fit, please contact us for a complimentary meeting to move forward or resolve any doubts.

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