

# Dave Shortill



## CLIENT SURVEY

Submit Form:

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Family Integrity Corporation

*"Saving my friends and family money since 1987"*

### 5 Key Issues Survey

Please complete this short survey enabling me to better understand your needs.

1. If you accumulate as many NET assets in the NEXT five years as you just did in the LAST five years, are you going to be satisfied with your progress at that point?

Yes                       No                       I don't know

2. Is the difference between what you OWN and what you OWE getting WIDER, NARROWER or STAYING THE SAME?

Getting wider               Getting narrower

Staying the same               I don't know

3. How many weeks of your typical month in retirement are FULLY funded by your current plans (based on date of retirement until end of projected life expectancy):

First week only               Two weeks               Three weeks

All four weeks               I don't know

4. Does your current life insurance pay you immediately to stay at home on the diagnosis of critical illness – or would you have to go to work whilst critically ill?

Pays me to stay at home whilst recovering

I would still have to go to work               I have no idea

5. How many of your children's further education is going to be fully funded, based on your current financial plan:

1 child                       2 children                       3 children

All of our children               I have no idea

Name \_\_\_\_\_ Phone \_\_\_\_\_

Email Address \_\_\_\_\_

Comments \_\_\_\_\_

\_\_\_\_\_