

# “Create Healthy Cashflow Strategy” One-on-One Session

with Jackie Porter, Certified Financial Planner

Are you serious about “Creating a Healthy Cashflow Strategy” for 2018?

Schedule a complimentary 1-hour strategy session. If you’re ready to take action and learn more about how you can create a healthy cashflow then read on.

This coaching session is valued at \$500, however, we are offering a one-time complimentary session at no charge to a limited number of interested people. If this is something you’d like to take advantage of please complete the information below and email it to Sharen Skene at [sharen.skene@cartewm.com](mailto:sharen.skene@cartewm.com) and she will reach out to schedule your session.



During your private and confidential conversation, you will:

- Find out exactly what areas of your finances needs tweaking and,
- Discover your most advantageous next move.

Please allow yourself time to thoughtfully complete this confidential questionnaire for an opportunity to have a private 1:1 “Create Healthy Cashflow Strategy” session with Jackie.

This is an **INTERACTIVE QUESTIONNAIRE**. Simply enter your responses in each of the blue text boxes. The more you can share now, the more beneficial your session with Jackie will be.

Take a minute now to **SAVE** this questionnaire on your computer. Then, once you’ve completed it, email it as an attachment. If you have any questions, session Sharen Skene, Client Experience Manager at **905-238-3535 ext 216** or send her an email at **[sharen.skene@cartewm.com](mailto:sharen.skene@cartewm.com)**

Date Completed

Full Name

Session Type Preference      Skype      Zoom      Facetime      WhatsApp      Regular Phone Session

Best Number or Skype ID

Home      Cellphone      Work      Ext.

Best Session Time:      Morning      Afternoon      Evening      Anytime

Email

What is your age?

Marital Status      Single      Married      Common-Law      Divorced      Widowed

Will your spouse be on the session with you?      Yes      No

How many dependents do you have?

Please check all that apply:

I am an action taking person who doesn’t want to settle.

I know my cashflow can be healthier than it is but am not sure why it isn’t.

I am ready to have a frank conversation about my cashflow and determine the best next action that will yield the biggest results.

I have an “investing in myself” mindset and when I see I need help, I invest the time, energy or money necessary to get the help I need.

I highly value this offer and I fully commit to showing up for my Strategy Session, ready to take action on the suggestions I receive.



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WEALTH MANAGEMENT INC.  
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## **“Create Healthy Cashflow Strategy” One-on-One Session** with Jackie Porter, Certified Financial Planner

1. What made you want to invest the time to talk with Jackie about improving your cashflow?
2. If employed, what is your current business or profession?
3. What's your biggest cashflow frustration right now?
4. What are your business or financial goals in the next 6 - 18 months?
5. How would you rate the financial systems and processes you have in place currently?
6. How else are your cashflow issues affecting you?
7. What do you think is getting in the way of achieving your goals?
8. On a scale of 1-10 (10 being extremely important and 1 being not at all) how important is it for you to solve these challenges so you can get your finances where you want it to be?
9. Why is working on this important to you now?



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10. What is your annual salary?      \$0-\$49K      \$50-\$99K      \$100K+
11. Do you have insurance for (Check all that apply):      Life      Critical Illness      Disability      Health      Don't Know
12. What is your current Net Worth?      **Does this include your spouse's Net Worth?**      Yes      No

ASSETS		LIABILITIES	
Cash in chequing/savings		Loans Payable To Banks	
Stocks & Bonds		Loans Payable To Finance Companies	
RRSPs		Credit Cards	
Real Estate Value		Mortgage	
Automobiles		Due On Automobiles	
Money Due To You		Taxes Payable	
Other Assets		Other Liabilities	
<b>TOTAL ASSETS</b>		<b>TOTAL LIABILITIES</b>	
<b>TOTAL ASSETS</b>			
<b>(LESS) TOTAL LIABILITIES</b>			
<b>NET WORTH</b>			

How did you hear about or meet Jackie ?

**Thank you for taking the time to complete this questionnaire.**

Please save it and email, in confidence, to Sharen Skene who works directly with Jackie Porter at Carte Wealth Management. Sharen's email address is sharen.skene@cartewm.com

If you have any questions you can email Sharen or session at (905) 238-3535 x 216.

Once Sharen has receive your questionnaire she'll reach out to schedule your time with Jackie.