What’s *YOUR* Financial IQ?

Are you ready improve your financial literacy? Here is how Jackie’s Team can help.

We are offering a one-time complimentary 30-minute phone consultation to a limited number of interested people. If this is something you’d like to take advantage of please complete our “Financial IQ” form and email it to Sharen Skene at sharen.skene@cartewm.com and she will reach out to schedule your session.

During your private and confidential consultation, 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 phone session with a member of Jackie’s team.

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 will be.

Take a minute now to SAVE this questionnaire on your computer. Then, once completed, email it as an attachment.
If you have any questions, contact Sharen Skene, Client Experience Manager at her direct number at **905-766-9443** or by email at **sharen.skene@cartewm.com**

Date Completed

Full Name

Best Number

Home   Cell   Work   Ext.

Best Session Time: ☐ Morning ☐ Afternoon ☐ Evening ☐ Anytime

Email

Marital Status ☐ Single ☐ Married ☐ Common-Law ☐ Divorced ☐ Widowed

Will your spouse be on the session with you? ☐ Yes ☐ No   Spouse’s Name

What is your age?   Spouse’s age

How many dependents do you have?   What are the ages of your dependents?

Please check all that apply:

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

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

☐ I am ready to have a frank conversation about my finances 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.

"What's *YOUR* Financial IQ?" 1-on-1 Consultation Call
with a member of Jackie Porter's team

1. What made you want to invest the time to talk about improving your finances now?

2. Are you working right now? ☐ Yes ☐ Self-employed ☐ No ☐ In transition

3. Is your spouse working right now? ☐ Yes ☐ Self-employed ☐ No ☐ In transition

4. If employed, what is your current profession? If applicable, what is your spouse or significant other's profession?

5. What's your biggest frustration around your finances right now?

6. What are your business or financial goals in the next 6 - 18 months?

7. How would you rate the financial systems and processes you currently have in place?

8. How else are your financial issues affecting you?

9. What do you think is getting in the way of achieving your goals?

10. On a scale of 1-10 (10 being extremely important and 1 being not at all) how important is it to solve these challenges so you can get your finances where you want it to be?

11. Why is working on this important to you now?

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12. What is your annual salary? ______ 12b. What is your spouse's annual salary? ______

13. Do you have insurance for (Check all that apply): ☐ Life ☐ Critical Illness ☐ Disability ☐ Health ☐ Don't Know

14. 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	
TOTAL ASSETS		**TOTAL LIABILITIES**	

TOTAL ASSETS	
(LESS) TOTAL LIABILITIES	
NET WORTH	

How did you hear about or meet Jackie ?

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

Please save this questionnaire and email it, 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 call her on her direct line at (905) 766-9443.

Once Sharen has received your questionnaire she'll reach out to let you know 'next steps' for your call.