



Complete this before your FREE 30-Minute Clarity Call. The more you share, the more we can help you.

**SECTION 1 — ABOUT YOU**

Name:	_____	Occupation:	_____
Annual Income:	\$ _____	Marital Status:	_____

**SECTION 2 — YOUR MONEY RIGHT NOW**

What does your current financial situation look like? (Check all that apply)

<input type="checkbox"/> Living paycheck to paycheck	<input type="checkbox"/> Saving but not consistently
<input type="checkbox"/> Have an emergency fund	<input type="checkbox"/> Carrying credit card debt
<input type="checkbox"/> Have a retirement account	<input type="checkbox"/> No clear budget or spending plan
<input type="checkbox"/> Investing regularly	<input type="checkbox"/> Not sure where my money goes

What is your biggest financial challenge right now?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**SECTION 3 — YOUR FINANCIAL GOALS**

What are your top 3 financial goals in the next 1-3 years?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Where do you want to be financially in 5-10 years?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**SECTION 4 — YOUR CLARITY CALL**

What do you hope to get out of our 30-minute clarity call?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## FINANCIAL CLARITY QUESTIONNAIRE

*Complete This Before Your FREE 30-Minute Clarity Call*



Book Free 30-Min Call

Is there anything else you'd like us to know before your call?

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Ready to take the next step? Book your FREE 30-Minute Clarity Call using the QR code above or visit [www.dickeyfinancialfirm.com](http://www.dickeyfinancialfirm.com). We can't wait to help you build the wealth and legacy you deserve.

### Dickey Financial Services & Wealth Management Firm

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