

Discovering My Ideal Outcomes

Successful wealth management is more than a series of investment decisions – more than a risk questionnaire or financial plan. Our experience shows that these items must be integrated with your personal goals. Broadly speaking, goals are things that reach into the heart of meaning for you, and we refer to them as Ideal Outcomes™.

This booklet is designed to help you and Highland better understand your Ideal Outcomes and to help you achieve them, as well. Discussing and answering the following questions together is the beginning of the process.

1. Tell me about your family.

Who is part of your household? (check all that apply)

- Spouse
- Children # ____
- Parents/In-laws # ____
- Others # ____

Do you have desires or obligations to provide for you parents, your siblings, or your extended family? No Yes (please explain)

What are your aspirations for your children? What type of life would you want for them?

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2. Tell me about your money history?

What role did money play in your home growing up?

What lessons about money did you learn from your parents?

What expectations do you have about your current investments?
