Exhibit III: Client's Current Situation – Questionnaire

Please answer the questions listed below.

This information will help me provide you with financial advice that applies to your current situation.

1. *Are there any questions or concerns you would like me to address at your review?*

2. *Are there any changes in your personal or financial situation that I should be aware of?*

3. *Do you anticipate any major expenses or purchases for the coming year?*

4. *Have there been any significant changes in your monthly income and/or expenses in the last year?*

5. *What other things would you like to cover during our meeting?*

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