1. What is the financial decision you are making/have made?
   - Giving a gift / loan (e.g., paying bills or tuition for grandchild, purchase of home for son to live in)
   - Major purchase or sale for self (home, car, renovations, services, invest in LTC or NH)
   - Investment Planning (retirement, insurance, portfolio balancing)
   - Estate planning (Will, beneficiary, DPOA, add/remove someone from bank account)
   - Turn over bill paying to someone else
   - Scam, Fraud, Theft (suspected)
   - Other: __________________________
   - Don’t know or inaccurate

   Notes:

2. Was this your idea or did someone suggest it or accompany you?
   - My idea
   - Someone else suggested/drove me here
   - Don’t know/inaccurate

   Notes:

3. What is the purpose of your decision?
   - Benefit self (meet a need, peace of mind)
   - Benefit family (whom?)
   - Benefit friends (whom?)
   - Benefit organization/charity (which?)
   - Please or satisfy someone else (whom?)
   - Don’t know/inaccurate

   Notes:

4. What is the primary financial goal? (PROBE)
   - Earn money (or retain value of investment)
   - Reduce tax burden
   - Reduce debt
   - Affordability of item(s) or service(s)
   - Share my wealth after my death
   - Allow someone else to access my money or finances / accounts (now)
   - Gift someone or a charity (which?)
   - Lifestyle (no $$ goal; meet a need/desire)
   - Other (describe) __________________________
   - Don’t know/inaccurate

   Notes:

5. How will this decision impact you now & over time?
   - Improve financial position
   - No impact
   - Negative impact/debt
   - Don’t know/inaccurate

   Notes:

6. How much risk to your financial well-being is involved?
   - Low risk or none
   - Moderate risk
   - High risk
   - Don’t know/inaccurate

   Notes:
7. How may someone else be negatively affected?
   - No one will be negatively affected
   - Family members **(who and why?)**
   - Someone else **(who and why?)**
   - Charity **(which and why?)**
   - Don’t know/inaccurate
   Notes:

8. Who benefits most from this financial decision?
   - I do
   - Family
   - Friend
   - Caregiver
   - Charity/organization
   - Don’t know/inaccurate
   Notes:

9. Does this decision change previous planned gifts or bequests to family, friends, or organizations?
   - No
   - Yes **(who and why?)**
   - Don’t know/inaccurate
   Notes:

10. To what extent did you talk with anyone regarding this decision?
    - Not at all
    - Mentioned it **(to whom?)**
    - Discussed in depth **(with whom?)**
    - Don’t know/inaccurate
    Notes: