

LUCE AND ASSOCIATES

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CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL

HOW DO YOU DEFINE SUCCESS?

When entering a relationship with a financial professional, it is often beneficial to articulate a broad vision of your goals and values. These should be related not only to your finances, but also to your priorities, and should address the short and long term. One key to a successful relationship is mutual understanding. To accomplish this we ask that you put some thought into answering the following questions.

What are your expectations of a financial professional?

What are you hoping a financial professional can achieve in the next one to three years? In the next five to ten years? And beyond?

In terms of our relationship, how would you define success? (Does it have to do with personalized comprehensive financial planning guidance, fiduciary investment advisory services, risk management or estate planning?)

How would you prioritize the following: protecting your financial interests, preserving and/or growing your wealth, and transferring wealth?

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