

Charitable – F.O.R.M

Family

Can you tell me 3 things that your family does to give back to your church or the community?

Occupation

Are you involved in your company's Community Involvement? If so, what do you do?

Recreation

Where do you socialize in group settings?

Personal

Family

Motivation/Money

Do you know what “Social Capital” is as it relates to managing your wealth?

What is your education, background, or experience in financial planning?

How do you define financial planning or what a financial advisor does? Does your financial advisor embrace Social Capital as part of his or her practice?
