

DC Self-Assessment

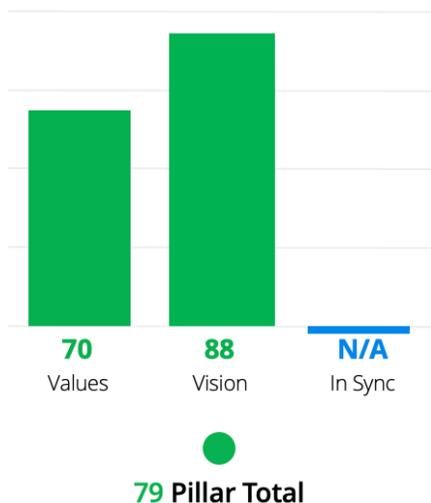
CLIENT/PROSPECT NAME



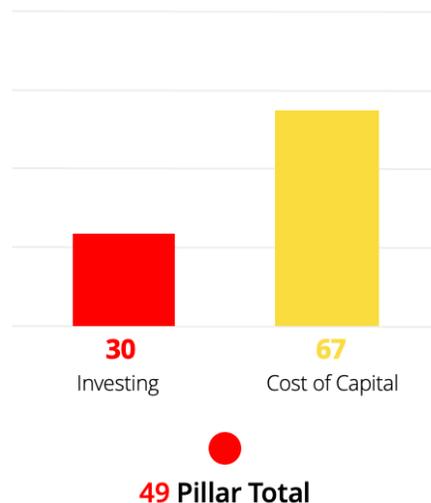
Your Focus assessment represents how you feel about your total financial life as of today. This data helps guide our work together. Please note, that 'green' areas may still need some attention and 'red' areas simply mean we need to figure out where the specific gaps are and how to address them together.



GET CLEAR



GROW WEALTH



MANAGE RISK



TOTAL PICTURE

