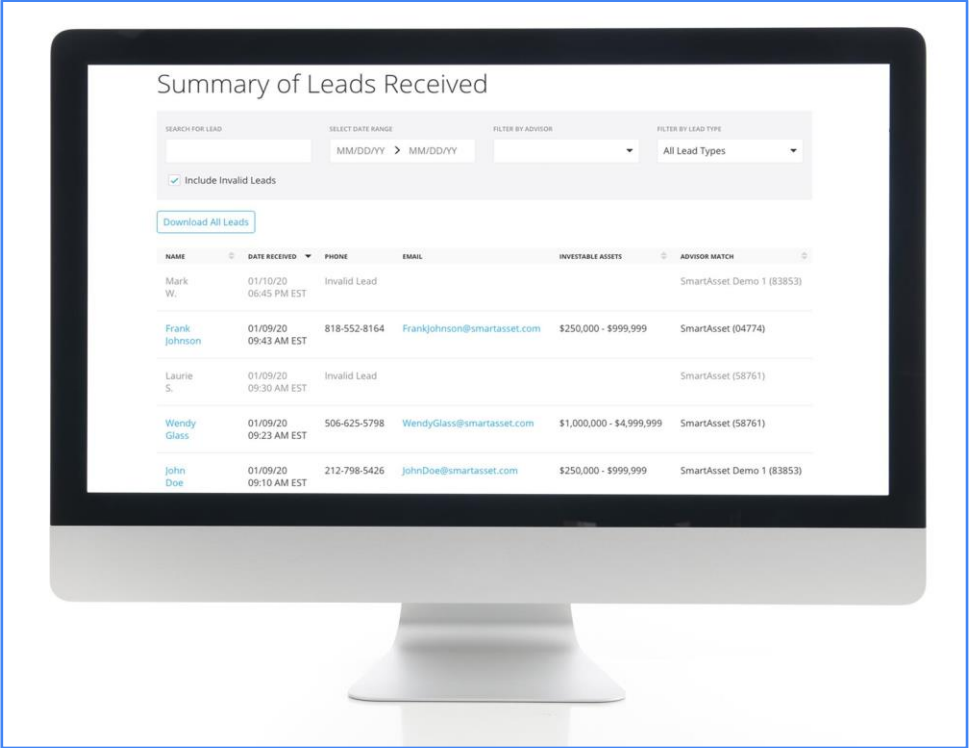


SmartAdvisor Portal For Advisors



Lead Information

Frank Johnson

Summary of Leads Received

Lead Details Received: 01/09/20 09:43 AM EST

Advisor Match: SmartAsset (04774)

Contact Information

Email

FrankJohnson@smartasset.com

Phone

818-552-8164

Zip Code

04774

Investor Responses

Zipcode:

04774

Investable Assets:

\$250,000 - \$999,999

Household income:

Less than \$40,000

Have a 401(k)?

Yes

Have an IRA?

Yes

When would you like to retire?:

Already Retired

Help managing retirement income?:

Yes

Want assessment of retirement readiness?:

Yes, must have

Why do you need an advisor?:

Other

Why do you need an advisor?:

Help with retirement

Investment comfort level:

Somewhat comfortable

Married?:

Yes

Saving separately or jointly:

Jointly

Are you a Homeowner?:

Yes

Recent mortgage refinance?:

No

Any children under 18?:

No

Business owner?:

No

If stocks drop 10% today, what do you do?:

Do Nothing

Help with taxes?:

Nice to have

Help with estate planning?:

Must have

Help with insurance products?:

Nice to have

Care about socially responsible investing?:

Must have

Do you have an advisor?:

No

Advisor need to be in driving distance?:

Yes

Savings per month:

Less than \$100

Any other questions?:

We would like to set up a college fund for our grandchildren.