

360 degree Client Needs Questionnaire

a) BUSINESS IMPROVEMENTS	NOTES/ COMMENTS	REQUIRES ATTENTION Y/N	PRIORITY 1-5	ACTIONS (BY WHEN)
1. What changes are you thinking about making for your business over the next 12 months?				
2. How would you describe the business cash flow performance?				
3. What industry and economic trends do you think will impact your business?				
4. What are your competitors doing?				
5. What marketing activities have you been doing?				
6. How do you feel about your role in the business? a. Hours worked? b. When did you last take a holiday? c. How are your team performing?				
7. What are the three most important things the business needs to address?				
8. When were you last frustrated in your business and what was the cause?				
9. What steps can be taken to ensure that it doesn't happen again?				

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b) WEALTH CREATION	NOTES/COMMENTS	REQUIRES ATTENTION Y/N	PRIORITY 1-5	ACTIONS (BY WHEN)
10. Do you know how much you need to live comfortably in retirement?				
11. Who is helping with that?				
12. How would you describe your relationship with them?				
13. How often do you meet to see how you are tracking?				
14. What changes are happening in your family that may require increased expenditure?				
15. What process do you go through to review your investments?				

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c) RISK MANAGEMENT	NOTES/ COMMENTS	REQUIRES ATTENTION Y/N	PRORITY 1-5	ACTIONS (BY WHEN)
16. What would happen if you or another family member died or became incapacitated tomorrow?				
17. How would your assets be distributed if you died?				
18. Do you have all the necessary legal documents to ensure this happens?				
19. If you or your business partner wanted to go separate ways what would happen. Is this all documented?				
20. What are your 3 biggest business risks?	1. 2. 3.			

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d) SUCCESSION & ESTATE PLANNING	NOTES/ COMMENTS	REQUIRES ATTENTION Y/N	PRIORITY 1-5	ACTIONS (BY WHEN)
21. What are your retirement plans?				
22. What are your plans for releasing the value of your business?				
23. What would happen if you couldn't work in your business?				
24. How much do you think your business is worth?	\$			

e) BUSINESS IMPROVMENT & TECHNOLOGY	NOTES/ COMMENTS	REQUIRES ATTENTION Y/N	PRIORITY 1-5	ACTIONS (BY WHEN)
25. What impact will new technologies have on your business?				
26. How do you ensure that you get the most out of your current technology?				
27. How do you ensure that you have the most efficient processing?				
28. What processes currently in place slow you down when getting things done?				