



Name: _____

FINANCIAL OBJECTIVES

Please rank in order of importance (1 being most important). Do not use the same number twice. Leave box blank if it doesn't apply.

	Achieve financial security for retirement
	Provide funds for children's/grandchildren's education
	Achieve other financial goals
	Maintain adequate life insurance
	Protect your resources in case of disability
	Obtain the greatest return on investments given your risk profile
	Minimize estate taxes and provide for your heirs
	Other: _____
	Other: _____
	Other: _____

Please provide specifics for the goals you have selected above.

Important Disclosure Information

Please remember that different types of investments involve varying degrees of risk, and that past performance may not be indicative of future results. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/or investment strategies recommended or undertaken by ProVise Management Group, LLC) will be profitable. Please remember to contact ProVise Management Group, LLC if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you want to impose, add, or to modify any reasonable restrictions to our investment advisory services. A copy of our current written disclosure statement discussing our advisory services and fees continues to remain available for your review upon request.

Client Signature

Date

Client Signature

Date

Please remember to contact ProVise Management Group, LLC, **in writing**, if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you want to impose, add, to modify any reasonable restrictions to our investment advisory services, or if you wish to direct that ProVise Management Group, LLC to effect any specific transactions for your account. A copy of our current written disclosure statement discussing our advisory services and fees continues to remain available for your review upon request.