



Client Relationship Plan

FOR:

Client

Address

Date:

Prepared for:

Your Goals and Objectives:

What is your overall goal and any challenges you see?

What are your primary goals/objectives for your family and what are you doing to accomplish them?

Short Term Goals: (1- 18 months)

Short term goals include:



Mid Term Goals: (2 – 5 years)

Midterm goals include:



Long Term Goals: (5 plus years)

Long term goals include:

What are the three things that are getting in the way of achieving your goals?



What impact will these issues have on achieving your goals?

If you don't do anything, what is likely to happen?

When do you plan to retire?

How much do you plan on needing, per year, to retire?



Your Expectations of your Financial Advisor:

How do you see your advisor helping you to meet your personal goals going forward?



Our recommendations and action plan to help you succeed:

RECOMMENDATIONS	ACTION PLAN	TARGET DATES	COMMENTS

About Kathy Cook Noble ...

Kathy was born and raised in St. Thomas, Ontario, Canada. Married with children, Kathy has been a lifelong participant in her community: an active businesswoman, volunteer and concerned citizen.

Kathy's background is owning and operating a successful business and understanding the principles of exceptional service. As the former owner/operator of NAPA AutoPro and Uniglass Plus/Ziebart she was privileged to be a recipient of the Free Enterprise Merit Award from the St. Thomas and District Chamber of Commerce in 2013. She works with the knowledge that success comes, not from her efforts alone, but in combination with those who are a part of the team. Together, goals are accomplished, exceptional service is rendered and success is achieved.

She worked in her family businesses for more than 20 years, while also working on the Ontario Motor Vehicle Industry Council Compensation Fund in Toronto for 8 years and taught in the business faculty at Fanshawe College.

She is a licensed Financial Advisor and works every day to help people, especially women, understand their finances and invest their money for their futures. She understands the financial challenges people face on a daily basis and has always had a passion to help those who need help to get on track, get ahead and save more of their money. Her excitement about finance and empowering women is contagious when you talk to her.



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