



# Objective Second Opinion™

We're delighted that you've decided to get a pulse on your personal financial situation by pursuing an automated Objective Second Opinion™.

Over the next few minutes you will be asked to answer a series of questions designed to generate objective observations for you that will deepen your knowledge of where you stand today and where areas for improvement may exist. While you may be able to answer many of the questions off the top of your head, having at hand your estate plan documents, investment, bank, mortgage and credit card statements as well as your insurance policies makes the completion of the questionnaire more efficient, more accurate and more valuable to you.

It's important to note that your Objective Second Opinion™ results are yours and yours alone. Your automated Objective Second Opinion™ results are designed to empower you to both better understand and take control of your personal financial situation. Your privacy is taken very seriously and your data will not be shared with anyone. At the end of the process, you may be given the opportunity to connect with an appropriate financial, tax, estate or other similar professional to discuss remedies to identified deficiencies. If you elect to make that connection, your data will then be provided to facilitate that connection. Please note that as no one can fully ensure 100% data safety, as an added layer of security, we suggest entering your first name and last initial in the questionnaire. You can always fill in the missing pieces after you have connected with the appropriate financial, tax, estate or other similar professional.

The automated Objective Second Opinion™ results are designed to empower you through education and are not to be construed as advice.

© 2019 WMOversight, LLC

Privacy Policy

