

Have you taken the Goals & Values Test on the website?

Please take the test prior to coming in for your Goal Setting appointment.

Each spouse must take this test individually. It'll only take about 20 minutes to complete.

1. go to www.cambridgeadvisors.com
2. ID: connection, Password: Client
3. Click on Goals & Values Tab on left side of screen.
4. Click on underlined Goals & Values.
5. Email to your advisor when complete.
6. Print yourself a copy

There are two parts to the test -first a 27 question list, then a "forced answer" section.

Have fun, contact your advisor if you have any questions.