Practice Dictation!

Below is a sample dictation script where you can play the role of a Financial Advisor, creating a note after a meeting with prospective clients.   Remember to speak punctuation commands (by saying the word "comma" to insert a comma or "period" to enter a period at the end of a sentence. Also, note the text in gray where you can say the words "New Paragraph" to create a new paragraph – all by voice!

John wishes to retire in ten years, and Mary wishes to continue working part-time while John is retired. *Say <new paragraph">*

Their primary financial goal is to maintain a balanced portfolio to provide adequate retirement income, starting at age 60 for both of them. Their stated initial annual retirement income goal is $100,000 of net, after-tax, spendable dollars. This income stream will be constructed to attempt to increase at an average annual inflation rate of around 3% over their life expectancy. This income stream will also be constructed to attempt to continue through John's age of 100. *Say <"new paragraph">*

They should maintain adequate disability and survivor income to maintain current living standards without depleting capital if one or both parents were to pass away. Currently, both of them are underinsured, so there are recommendations for buying more life insurance and disability insurance for both. *Say <"new paragraph">*

Buy insurance policies to create a safety net for long-term care. *Say <"new line">*

John indicated that he's willing to quit smoking and refinance the mortgage in 2021. *Say <"new line">*

Restructure income and assets to achieve current tax liabilities. *Say <"new line">*

Completely fund college educations for all three children, but only at public colleges. *Say <"new line">*

Increase the average rate of return on investments using asset allocation techniques. *Say <"new line">*

Say "<select all>."

Say "<copy that>."