

What's important to you?

Please check the three or four items that are the most important to you.

(number selected items in order of importance 1,2,3,4)

- Having enough income during retirement
- Purchasing a retirement property or secondary residence
- Providing for education of children or grandchildren
- Making sure that my family will be secure in the event of a catastrophe, i.e., death or disability of a breadwinner
- Restructuring or eliminating debt
- Passing my estate to my heirs smoothly without court battles
- Protecting my estate from estate taxes and transfer costs
- Providing a legacy and financial resources for successor generations
- Position myself to enjoy more of the things in life I value
- Providing capital for the charitable organizations that I support
- Avoiding capital gains or excessive taxes on the sale of business interests or investments
- Determine where and how to withdraw funds from investments to provide for my retirement income
- Reducing the income taxes that are generated from my investments
- Knowing how my business plans may impact my financial future
- Having someone study my financial profile and make a recommendation on what strategies I should implement
- Protecting my assets from creditors and liability law suits
- Knowing where to put old and new investment funds to maximize tax efficiency and meeting my liquidity needs in the future
- Having peace of mind and a sense of security regarding my financial future
- I have complete confidence my insurance/investment strategies are meeting my goals and do not need reviewing at this time. I have a good understanding of their design and purpose. I know I can call anytime to schedule a visit for such a review.

Name: _____ (signature) _____ Date: _____