

Your financial freedom starts with what matters most to you and your family, so tell us more about your goals for retirement:

Ideal Retirement Age for You and Your Spouse: _____

Family Longevity (living beyond 90) for You or Your Partner: ☐ Yes ☐ No

I would like to leave an estate worth at least: _____

If I am unable to meet my goals, I would prefer to:

☐ Retire Later

☐ Spend Less in Retirement

☐ Save More Now

Please review the items listed below and check off your top priorities:

Retirement	☐ How do I manage all of my retirement accounts? ☐ Do I have a strategy in place to maximize my Social Security?	☐ Am I saving adequately for my retirement goals? ☐ What should I do now to prepare for retirement? ☐ Will my money last through retirement?
Risk Management	☐ Am I properly insured in the event of a disability? ☐ How would my family be impacted in the event of my or my spouse's premature death? ☐ Is my family well protected in the event of a large healthcare expense?	☐ Is my property adequately insured? ☐ Am I personally protected against possible liabilities? ☐ Do I know how, and when to file for Medicare?
Estate Planning	☐ Is my living trust up to date? ☐ How do I create a legacy for my heirs? ☐ Are my assets titled congruently with my estate plan? ☐ Are all my primary and contingent beneficiaries up to date on my retirement plans, annuities, and life insurance?	☐ Will my family be financially secure if something happens to me? ☐ What is the best way to contribute to my favorite charities during and after my lifetime? ☐ Are all named fiduciaries informed of their responsibilities in executing my estate plan?
Business Planning	☐ Is my business in the best entity structure for tax reduction and asset protection purposes? ☐ Are there tax strategies available? ☐ Am I utilizing the best retirement plan design for myself and my employees?	☐ How can I use my company to maximize my personal retirement savings? ☐ Do I have a written exit plan to maximize the net value of my business when it is time to retire?
Education Planning	☐ How do I best provide for my children or grandchildren's education?	☐ What are all of my education funding options?
Life Events	☐ What are the steps I need to take when I change jobs? ☐ What do I do when a loved one dies? ☐ How should we prepare financially for a new child?	☐ How do we best manage our finances after getting married or remarried? ☐ Am I aware of my responsibilities and liabilities as a successor trustee, executor, or other fiduciary?
Eldercare	☐ Do I need long-term care insurance? ☐ What do I need to know if I become a caretaker for my aging parents?	☐ What are my best options to protect my estate against extended care costs?
Personal Finance	☐ How do I keep my records safe and organized? ☐ How do I have financial discussions with my family? ☐ Are my financial records prepared for a tax audit?	☐ How do I teach my children or grandchildren about money? ☐ Am I well protected in the event of a scam or cyber security attack?