



## *What's important to you?*

Please check the items that are the most important to you. You can further prioritize the items you checked into categories "A, B, and C", with A being Most Important, B is Very Important, and C as Important

- Having enough income during retirement
- Purchasing a retirement property or secondary residence
- Providing for education of children or grandchildren
- Discuss my most important financial goals. What I hope to accomplish financially within the next year or two? The next 5 years? 10 years? 25 years
- 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
- Help with putting together a budget to optimize my spending
- Providing capital for the charitable organizations that I support
- What is my risk tolerance and how much risk am I taking now with my investments
- 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
- Help with coordinating and organizing all financial assets and documents

- ❑ Reducing the income taxes that are generated from my investments
- ❑ Having a complete review of my investment portfolio to see what type of returns I have been getting and what type of risk I have been taking
- ❑ Having someone study my investment profile and make a recommendation on what type of portfolio I should have
- ❑ Am I saving enough for my large purchases (a new home, a wedding, a car or boat, ...)
- ❑ Analysis of my current and potential real estate and private equity investments to determine which ones I should keep and/or add to my portfolio
- ❑ Do I have enough money in my Emergency Fund
- ❑ Protecting my assets from creditors and liability law suits
- ❑ If something were to happen to me, would my family be able to put everything together
- ❑ Knowing where to put old and new investment funds to maximize tax efficiency and meeting my liquidity needs in the future
- ❑ Discuss whether it makes to purchase Long Term Care Insurance
- ❑ Determining my current net worth
- ❑ Discuss the latest types of investments that may be negatively correlated to the stock market
- ❑ Discuss life goals
  - If I only had 5 years to live, what would I change in my life
  - If money were no object, what would I be doing right now
  - If I found out I was going to die tomorrow, what do I regret not doing
- ❑ Having a plan in place for my financial future