

Name

Date (MM/DD/YYYY)

Phone

Email

Goals and concerns

Importance: Low >>> High

Planning for major expenditures

Owning a home

Saving to meet goals (second property, family vacation, etc.)

Helping children or other family members (education, down payment)

Optimizing your retirement

Funding my desired retirement lifestyle

Creating a sustainable source of retirement income

Retiring mortgage free

Managing multiple sources of income in retirement

Creating a meaningful vision for the next phase of my life

Dealing with the rising costs of health/long-term care (elder care)

Sharing your wealth

Leaving a financial legacy for my children

Planning for a family member with special needs

Maximizing my estate (including use of insurance)

Legacy planning & charitable giving

Tax minimization

Reducing taxes today

Minimize tax on the estate

Planning for the unexpected

Ensuring my partner/spouse is taken care of should I pass away first

Protecting my wealth for my family's future well-being

Maintaining my cash flow in the event of disability or illness

Managing cash flow

Effective use of credit to manage cash flow and liquidity

Creating a debt management plan

Investment portfolio management

Diversifying total wealth across different asset classes

Ensuring Sustainable Investing / ESG is represented in my portfolio

Managing market and economic risks to my portfolio

Market insights, investment research and information

Maximizing your business success

Tax-efficient compensation and investment planning

Succession planning (selling or transferring a business, farm, or fishing operation)

What are your most important goals and concerns?

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