



In 10 minutes, you'll know if you need a financial review.

Name		
Address		
City	State	Zip
Phone		
Birthday (month/year)		
Spouse Name		
Birthday (month/year)		
Children and Ages		
Occupation / Title		
Company Name		

1. Do you know your family's net worth?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Uncertain
2. Can your cash reserve cover three to six months of living expenses?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Uncertain
3. Do you balance your checkbook every month?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Uncertain
4. Are you certain that you have enough life insurance protection for your family?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Uncertain
5. Do you have an up-to-date list of all your insurance policies, credit cards, investments, and legal documents?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Uncertain
6. Do you understand every financial product you own?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Uncertain
7. Have you started funding for your children's or grandchildren's college education?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Uncertain
8. Does your estate planning take into consideration the costs of long-term care?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Uncertain
9. Have you calculated the cost of retirement?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Uncertain
10. Are you contributing to an individual retirement account or qualified retirement plan?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Uncertain
BUSINESS OWNERS: 1. Do you need income from your assets?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Uncertain
2. Do you enjoy paying taxes?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Uncertain

If you answered NO to at least three of these questions, a financial review would be beneficial.

Next Steps:	Call me to arrange an appointment with the following objectives:	<ul style="list-style-type: none">• Discuss your financial goals.• Discover your options.• Develop a strategy.	Gather any pertinent information.	Attend one of our educational seminars.
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