



## The Lyon Group Goal Positioning Sheet

(please check all that apply)

Name(s): \_\_\_\_\_ Date: \_\_\_\_\_

### Destination – What are your objectives?

- Maintain lifestyle throughout lifetime
- Increase income
- Manage the risks of life
- Assure financial security of family members
- Assist children or grandchildren financially
- Greater clarity of purpose or life balance
- Make a difference through charitable causes during or beyond lifetime

### Obstacles – What might get in the way?

- Tax rates may increase
- Stock market volatility
- Risks of life: death, disability, healthcare
- Frivolous lawsuits
- Lack of coordination among personal and business assets
- Greater longevity- outliving financial resources
- Lack of clarity/confidence/objective/guidance in decisions
- Estate documents more than three years old

### Opportunities – What excites you about the future?

- Enjoying a productive retirement
- Achieving Financial Independence
- Financially mentoring others
- Start a new business or career
- Funding a unique lifestyle
- Passing on family values as well as family wealth
- Providing a lasting legacy to community

### Strengths – Where are you now?

- History of living within means
- Common sense
- Net worth of \$ \_\_\_\_\_ (optional)
- Household income of \$ \_\_\_\_\_ (optional)
- Successful business or career
- Long-term relationships
- Some planning already in place
- Personal/Family Values (specify): \_\_\_\_\_

The GPS® is an integral element of the Financial Navigation System™ and cannot be used without the express written consent of The Lyon Group located at 4357 Ferguson Drive, Suite 240, Cincinnati, OH 45245. Robert A. Newhouse is Registered Representative offering securities through NYLIFE Securities LLC, Member FINRA/SIPC, a Licensed Insurance Agency. Financial advisor offering investment advisory services through Eagle Strategies LLC, a Registered Investment Adviser. The Lyon Group is not owned or operated by NYLIFE Securities LLC or its affiliates. Adtrax#445067