

Your Priorities

What's most important to you?

Your Current Situation

- Income & Expenses
- Assets & Debt
- Savings Strategies – Increase Savings
- Create or Update Financial Plan

Your Future Situation

- Determine Income Required in Retirement
- Strategy for Income Replacement
- Protect against Long-Term or Critical Illness
- Understand Your Pension Choices

Your Family

- Protect Loved Ones from Death or Illness
- Provide Assistance for Children's or Grandchildren's Education
- Assist Parents / Children
- Update Wills and Powers of Attorney
- Educate Family on Money Issues

Your Work/Business

- Change Careers/Job
- Upgrade Career Potential
- Start/Buy a Business
- Provide for Business Succession
- Take a Sabbatical
- Protect Ability to Generate Income

Your Home & Property

- Pay Down Mortgage
- Sell Home and Downsize/Rent
- Purchase a Home
- Renovate Home
- Purchase Vacation Property
- Purchase Income Property

Your Recreation

- Fund Annual Vacation
- Save For a Dream Trip
- Fund Hobbies

Your Tax Situation

- Pay Less Tax
- Choose Tax-Efficient Money Solutions

Your Money Concerns

- Choose Better Solutions/Products
- Reduce Fees
- Simplify/Consolidate Accounts
- Reduce Market Ups and Downs
- Improve Understanding of Money Issues/Markets
- Increase Long-Term Returns
- Determine Appropriate Risk for Your Needs

Your Legacy

- Donate to Charities of Importance
- Set up Donor Advised Funds
- Pass on Assets to Heirs
- Pass on Assets with Less Tax
- Discuss Estate with Family Members
- Organize Estate Information

Other Goals or Concerns

- _____
- _____
- _____
- _____
- _____

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