

# LIFESTYLE CONCERNS

NAME

Date

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**1. When you think about your finances, what are your three biggest worries?**

**Completed**

Notes

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**2. What is the most important financial issue in your life at this moment?**

**Completed**

Notes

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**3. What do you see yourself doing in retirement?**

**Completed**

Notes

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**4. How confident do you feel about your ability to fund your desired retirement lifestyle?**

**Completed**

Notes

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**6. Are you planning to use all of your money in retirement, or do you plan to leave some to your children?**

**Completed**

Notes

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**7. Describe the plans you have put in place to minimize taxes to your estate?**

**Completed**

Notes

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**8. What other responsibilities do you have? For example, are you currently or in the future will you be taking care of your parents?**

**Completed**

Notes

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**9. Will your children take care of you in your old age?**

**Completed**

Notes

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**10. Do you have an investment advisor and how do you feel about that relationship?**

**Completed**

Notes