

LIFESTYLE CONCERNS

NAME

Date

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

Completed

Notes

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

Completed

Notes

3. What do you see yourself doing in retirement?

Completed

Notes

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

Completed

Notes

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

Completed

Notes

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

Completed

Notes

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

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

Completed

Notes

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

Completed

Notes