

RETIREMENT INCOME PRIORITIES

DATE

FIRST NAME

SPOUSE NAME

LAST NAME

Please rate the following in terms of their importance to you

	Unimportant	Low Importance	Neutral	Important	Very Important
Income Security - Being certain you will not outlive your income					
Highest Possible Income Today- Use all assets to create the largest possible income immediately					
Using Capital Assets- Willing to reduce the value of your assets to create your income					
Liquidity - Access to all my assets is important					
Liquidity - Access to a portion of my assets is important					
Estate Transfer - Importance of leaving assets to family after death					
Tax Reduction - Explore strategies to pay less tax on your income					
Coping With Inflation - Having your income grow to maintain purchasing power					
Health Risk Management - Minimizing the use of your personal assets for health care					