What Matters To You?



Please check the three items that are the most important to you.

Having enough income during retirement.
Purchasing a retirement property or second residence.
Providing for education of children or grandchildren.
Family security in the event of premature death or disability.
Restructuring or eliminating debt.
Legacy planning for estate.
Positioning myself to enjoy more of the things in life I value.
Providing capital for the charitable organizations that I support.
Optimizing capital gains or excessive taxes on the sale of business interests or investments.
Determining where and how to withdraw funds from investments to provide for my retirement income.
Reducing the income taxes that are generated from my investments.
Having a complete review of my investment portfolio to see what type of returns I have been getting and what type of risk I have been taking.
Having someone study my investment profile and making recommendations on what type of portfolio I should have.
Protecting my assets from creditors and liability law suits.
Having peace of mind and a sense of security regarding my financial future.
Finding quality senior care.
Other (specify):

Insurance issued by Principal National Life Insurance Co. (except in NY), Principal Life Insurance Co., and the companies available through the Preferred Product Network, Inc. Securities and advisory products offered through Principal Securities, Inc., member SIPC Principal National, Principal Life, the Preferred Product Network and Principal Securities are members of the Principal Financial Group®, Des Moines, IA 50392. Craig Vejvoda, Igor Ferreira, and Bryce Harris, Principal National and Principal Life Financial Representative, Principal Securities Registered Representative, Investment Adviser Representative, and a member of the Principal® Financial Network. True Legacy Financial & Insurance Services is not an affiliate of any company of the Principal Financial Group®. Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP® in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements. 2087043-042022