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): ______________________________