



# Financial Planning Survey

*Help Me to Help You...*

Please review the following financial planning issues below and checkmark (✓) those that are of primary concern or interest:

- Retirement Planning:
  - How much do I need to save to provide for a comfortable retirement?
  - How long will my retirement savings last?
  - I am concerned about my retirement plan and/or cash flow
  
- Investment Planning:
  - Lack of diversification in my current investment portfolio
  - Difficulty in managing my current investments
  - I need the discipline of a professional manager
  
- Tax Planning:
  - Are my investment objectives coordinated with my tax planning?
  - What should I be aware of before it's too late to fix?
  
- Estate Planning – Wills, Power of Attorney, Trusts, Probate
  
- Risk Management – Life Insurance, Disability, Long Term Care, Casualty
  
- Education Planning - Funding Strategies for College education for my heirs
  
- Cash Flow or Budget Issues: \_\_\_\_\_
  
- Recent Events: \_\_\_\_\_
  
- Other: I would like advice regarding:

Name: \_\_\_\_\_ Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_ Preferred Contact: Mail Phone E-Mail

Best time of day to be contacted: Morning Afternoon Evening

***Complete and mail this survey to review with one of our Financial Advisors, or call to make an appointment to discuss your responses in person!***

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