

REGARDING FINANCIAL INDEPENDENCE

Do you know if your resources exceed your life time needs? Or would you be happy if you were able to continue to grow wealth at your current rate? Is good health important to you and your family?

	Desired Situation	Current Situation	Issues
Net Worth			
Estate Planning			
Tax Planning	Investments: Income: Business:		
Retirement Planning	Age: Income: Lifestyle:		
Risk Management	Life: Disability: Critical Illness:		
Financial Management	Cover: Investment Return: Inflation Assumption:		
Debt Management	Mortgage: LOC: Credit Cards:		
Education Funding			

