

# What is Your Financial Wellness?

Take your financial check-up now

If your answer to any of the questions below is no, it's time to talk to your advisor.



## TAX PLANNING

Do you feel you use all available techniques to reduce your federal and state taxes?

## INVESTMENT PLANNING

Are you happy with your level of risk and returns this past year?

## RETIREMENT PLANNING

Have you had an analysis done to see if you can continue the same life style you live today, at retirement?

## INCOME PLANNING

Do you feel comfortable that if you are disabled, all of your personal and business bills will be paid?

## ASSET PRESERVATION

Do you feel you have an appropriate amount of life & liability insurance given your financial goals?

## ESTATE PLANNING

Do you have a current properly drafted will, living will, and trust that protects your family members?

## BUSINESS PLANNING

When was the last time you appraised your business?

## EDUCATION PLANNING

Have you determined what you will need to invest to educate your children & grandchildren?

## DEBT MANAGEMENT

Do you have a debt management plan as to how to use debt to your advantage?

## SPECIAL NEEDS

Does anyone in your family have special needs (Alzheimer's, disabilities, alcoholism, drug addiction, M.S.)?



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