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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