

Financial Priorities

For: _____

Please number, in order of priority, the six areas that you feel are most important to you at this time, "1" being the most important.

_____ Accumulate sufficient assets to provide a comfortable retirement income.

_____ Protect assets and their accumulation from the effects of inflation.

_____ Provide educational funds for my children/grandchildren.

_____ Provide support for a dependent other than a child.

_____ Minimize my personal income taxes.

_____ Develop an appropriate investment strategy.

_____ Arrange my portfolio to reduce the risk of loss.

_____ Provide an adequate standard of living in the event of death.

_____ Establish proper wills and trusts for non-tax purposes.

_____ Reduce or avoid taxes on my estate.

_____ Reduce insurance costs while being sure that coverage is appropriate.

_____ Organize my important papers, documents and financial affairs.

_____ Use the tax advantages of charitable giving.

_____ Provide an adequate standard of living in the event of disability.

_____ Manage my affairs well during retirement.

_____ Protect assets in the event of long-term care (nursing home, etc.).

_____ Preserving estate for the benefit of children/grandchildren.
