



What's Important To You?

Name: _____ Date: _____

From the list below, please choose the three items that are most significant to you and rank them in order of importance.

Wealth Management Issues

- A. Having enough income during retirement
- B. Purchasing a retirement property or secondary residence
- C. Providing for education of children or grandchildren
- D. Restructuring or eliminating debt
- E. Positioning myself to enjoy more of the things I value in life
- F. Determining where and how to withdraw funds from investments to provide for/supplement my income
- G. Having a complete review of my investment portfolio to see what type of returns I've experienced and the type of risk I've been exposed to
- H. Having someone study my investment profile and make recommendations on the type of portfolio for me
- I. Reducing the income taxes generated from my investments
- J. Knowing where to put old and new investment funds to maximize tax efficiency and meeting my liquidity needs in the future
- K. Having peace of mind and a sense of security regarding my financial future
- L. Making sure that my family will be secure in the event of a catastrophe, i.e., death or disability of a breadwinner
- M. Passing my estate to my heirs smoothly without court battles
- N. Protecting my estate from estate taxes and transfer costs
- O. Providing a legacy and financial resources for successor generations
- P. Providing capital for the charitable organizations I support
- Q. Avoiding capital gains or excessive taxes on the sale of business interests or investments
- R. Protecting my assets from creditors and liability law suits
- S. Aligning my investment decisions with my core values

The three items of most importance to me are:

- 1. _____
- 2. _____
- 3. _____