

# Key Questions

Name(s)	
Address	
Phone #	
Email address	
Age(s)	
# of Children & Ages	

Do you currently have credit card or personal loan debt?	Yes / No / ?
Do you have an emergency fund sufficient to cover at least 3 months' worth of living expenses?	Yes / No / ?
Is your emergency fund readily available and earning a competitive yield?	Yes / No / ?
In the event of disability, would you suffer more than a 20% reduction in income?	Yes / No / ?
In the event of your death(s), would you have enough life insurance to payoff your debts, provide for your lifetime goals such as college savings or replacing lost retirement savings, and replace your earnings?	Yes / No / ?
Should you require additional care either in an assisted living facility or home health care, do you have enough assets to cover the costs <i>and</i> provide your healthy spouse with enough income to maintain their lifestyle?	Yes / No / ?
If your identity were stolen today, would you have the time, money, and ability to clear your name?	Yes / No / ?
In the event that you were found personally liable for an accidental injury to someone else that resulted in a lawsuit, would your assets be protected?	Yes / No / ?
Have you determined when you will be able to retire, how much money you will need to have, and how much money you will be able to take out of your nest egg each year without running out of money during your lifetime?	Yes / No / ?
In order to accumulate the most money possible for your long-term goals, have you maximized all of the tax favored accounts and/or investments available by law?	Yes / No / ?
As related to your investment portfolio, have you structured your portfolio to provide the highest level of return relative to the amount of risk you have undertaken?	Yes / No / ?
Have you executed a proper estate plan that includes a will and/or trust, durable power of attorney, healthcare power of attorney, and living will?	Yes / No / ?
With the costs, publicity, and delays associated with probate, do you own your assets in a manner that would escape this process?	Yes / No / ?
Does your estate plan prevent the unintentional disinheritance of your children?	Yes / No / ?
Does your estate plan protect your children's future inheritance from a bad marriage?	Yes / No / ?
Does your estate plan minimize estate and inheritance taxes?	Yes / No / ?

Notes or Comments:

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