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CURRENT GOALS AND CONCERNS

Name: _____

Date: _____

Please check each goal or concern that is important to you at this point in time. Feel free to add additional goals and concerns.

Having Adequate Cash Reserves & Emergency Funds
Budgeting and/or Managing Debt
Avoiding/Preparing for Unemployment or a Time Period with Reduced Income

Providing for Children's Education

Review of Investment Portfolio
Review of Asset Allocation
Avoiding Excessive Investment Risk
Offsetting Inflation
Invest a Lump Sum of Money

Avoiding Excessive Income Taxes

Having Adequate Retirement Income
Having the Ability to Retire Early
Managing Distribution of a Pension
Protecting Assets from Medicaid

Purchasing a Home
Purchasing a Vacation Home or Second Home
Purchasing a New Car

Starting a Business
Growing a Business

Providing for the Family in Case of Death
Providing for the Family in Case of Disability
Having Adequate Medical Coverage
Having Adequate Property & Liability Coverage

Avoiding Excessive Estate Settlement Taxes
Transferring Ownership of Assets

Other: _____
Other: _____
Other: _____
Other: _____