

Financial Checkup

Cash Flow & Debt Management	Yes	No	How important is it to you? (1 - Very Important 2 - Important 3 - Not Important)
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Do you have a written annual or monthly budget?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you have a clear picture of what money is flowing in and out each month?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you have a FICO Score over 700?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you know your total debt balance due amount (mortgage, loans, credit cards, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you know your current Net Worth?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Family Risk Management	Yes	No	How important is it to you? (1 - Very Important 2 - Important 3 - Not Important)
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Do you have a risk management advisor that helps you evaluate your insurance needs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you have a Family Risk Management Plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you have life insurance besides the benefit provided by your employer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you have disability insurance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you have long term care insurance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Investment Management	Yes	No	How important is it to you? (1 - Very Important 2 - Important 3 - Not Important)
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Do you have an investment advisor that helps you select, monitor and rebalance your investments?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you have an investment plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you know your Risk Tolerance Level?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Did you rebalance your portfolio because of the decline in the stock market over the past 2 years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you have a goal associated with each investment that you own?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Retirement Planning	Yes	No	How important is it to you? (1 - Very Important 2 - Important 3 - Not Important)
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Do you have a retirement planning advisor that helps you plan for retirement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you have a retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you currently invest in your employer's 401K Plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you have 401K funds that need to be rollover?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Are you currently funding a ROTH or Traditional IRA?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Financial Checkup

Education Planning	Yes	No	How important is it to you? (1 - Very Important 2 - Important 3 - Not Important)
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Do you have a education advisor that helps you plan for your children or grandchildren future education?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a education plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a 529 College Saving Plan setup for your children or grandchildren?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a Educational IRA (Coverdell) setup for your children or grandchildren?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know how saving for college can impact future Financial Aid, income and estate taxes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Legacy Planning	Yes	No	How important is it to you? (1 - Very Important 2 - Important 3 - Not Important)
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Do you have a legacy planning advisor helping you determine what your wishes are when you pass away?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a will?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a healthcare directive?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have your obituary already prepared?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have an estate plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Business Planning	Yes	No	How important is it to you? (1 - Very Important 2 - Important 3 - Not Important)
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Do you have business advisor that helps you evaluate business opportunities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is your business incorporated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a business plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you need a business loan to grow your business?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your business have retirement plans setup for you and your employees?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Special Situations	Yes	No	How important is it to you? (1 - Very Important 2 - Important 3 - Not Important)
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Do you have an advisor to help you plan for special situations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you plan on getting married within the next several years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you plan on buying a new home within the next several years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you plan to take a dream vacation within the next several years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you plan to buy a new car within the next several years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>