



If you could wave a "magic wand" and create the "perfect lifestyle," what would it be like? \_\_\_\_\_

\_\_\_\_\_

Where would you live? \_\_\_\_\_

Would you do any traveling? yes / no If yes, where would you go and why? For how long and how often? \_\_\_\_\_

\_\_\_\_\_

If you could change anything about your current lifestyle or circumstances, what would it be? \_\_\_\_\_

\_\_\_\_\_

What would you keep exactly the same? \_\_\_\_\_

\_\_\_\_\_

What do you enjoy doing the most when you're not working? (If you're still working) \_\_\_\_\_

\_\_\_\_\_

What are the 3 most important things you can teach or have taught your children?

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

What do you desire most for your current and/or future family? \_\_\_\_\_

\_\_\_\_\_

If you passed away suddenly, what would you most regret not having done? \_\_\_\_\_

\_\_\_\_\_

What do you consider to be your greatest accomplishment in life thus far? \_\_\_\_\_

\_\_\_\_\_

What are your most pressing financial concerns right now? \_\_\_\_\_

\_\_\_\_\_

What do you like most about your current (or past) occupation? \_\_\_\_\_

\_\_\_\_\_

What did you like least? \_\_\_\_\_

\_\_\_\_\_

Over the next 5 years, do you expect your income to increase, decrease or stay the same? \_\_\_\_\_

Why? \_\_\_\_\_

\_\_\_\_\_

If not already retired, when do you plan to retire or when would you like to be financially independent? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What is preventing you from retiring right now? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What is your monthly or annual after-tax income need for your financial independence in today's dollars? \_\_\_\_\_

Do you have any specific goals or objectives concerning financial independence/retirement? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Primary residence paid for?   yes     no                      Second home at the coast/in the mountains?   yes     no  
Other? \_\_\_\_\_

What will you do after retirement? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you or your family have any physical or medical concerns that would affect your strategic plans? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Are your parents living?   yes     no  
Do you expect to become financially responsible for your parents or other family members at some point? \_\_\_\_\_

Are you and/or your spouse likely to receive any inheritances?   yes     no  
If so, how much and when likely? \_\_\_\_\_

Of your present investments, which do you feel are NOT currently meeting your needs? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please give a brief description of your current estate plan and the specific strategies you have implemented: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you feel that your current estate plan will achieve the specific goals and desires you have for your lifetime and for future generations?   yes     no  
Why or why not? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you want your current estate plan to focus more on benefits for you during your lifetime or focus more on benefits for your heirs after you are gone, and why? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What benefits would you like to see your estate plan provide to you during your lifetime that it does not currently provide?

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Is it your desire to maintain your current standard of living for your spouse/family in the event of your death? yes no

Do you want your spouse to have the economic ability to decide whether to work, or not, after your death? yes no

Do you wish to leave a definitive dollar figure within your estate to your heirs? yes / no \$ \_\_\_\_\_

How should debts be handled at your death? \_\_\_\_\_

Do you feel that your existing plan will adequately protect you from lawsuits and liabilities that might occur in the future?

yes no

Why or why not? \_\_\_\_\_

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If capital gains taxes were not an issue, would you sell any of your current assets? yes no

If yes, which ones and why? \_\_\_\_\_

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What would you do with the sale proceeds? \_\_\_\_\_

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Do you currently have assets you want to keep intact and pass them exactly as they are to your heirs? yes no

If yes, what are these assets and why do you want to keep them in the family? \_\_\_\_\_

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Do you care whether your heirs sell some or all of these assets after they inherit them? yes no

Why or why not? \_\_\_\_\_

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Do you know approximately how much your heirs would pay in estate taxes if you and your spouse were to both pass away tomorrow? yes no

If yes, how much? \$ \_\_\_\_\_

Do you have a desire to reduce the estate taxes that your heirs will pay? yes no

Do you want your heirs to receive the entire inheritance all at once or do you have some other distribution plan in mind?

Please describe your "perfect situation" with regard to this issue: \_\_\_\_\_

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If you have grandchildren, what are your desires with regard to an inheritance for them? \_\_\_\_\_

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Would you like to see your wealth preserved to benefit generations of your family beyond the lives of your grandchildren or other close relatives? yes no

Why or why not? \_\_\_\_\_

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