

Insurance – Protect Assets	Life Now – to Retirement	Retirement – 60 +
---------------------------------------	-------------------------------------	--------------------------

1

3

2

Do you have home or renters insurance? Do you have auto insurance? Do you know how much you pay for that? OK – We will check on that later to see if we can save you some money there.	NOW – Let's focus on the middle box – Your life from now until you retire!! This is very important – most people put something away for retirement but miss out on investing for Life Now! ~	We want to make sure you can retire, right? We want to make sure that you are putting enough away for the long term future.
Do you have life insurance in place now?		Do you currently save for retirement?
No – Ok – we will look at that in more detail later too.	What are some of your goals? Things you want to do now or before you retire? WFA	Is it a work plan? 401K, Pension?
Yes – Is that through work?	What if money was no object – what else would you do?	Do you have any IRAs?
NO- OK – we will look at that in more detail later.	Change lifestyle?	Great – We are going to do a quick check on your retirement b4 we end today.
Yes – Ok we can look at that in more detail later.	If not mentioned, ask about kids education, travel, home or second home? Ask about a different career..	
	Go to Mobile FNA Great – We are going to do a quick check on your retirement b4 we end today.	
Take notes on what they say	Make a list of what they say	Take notes on what they say