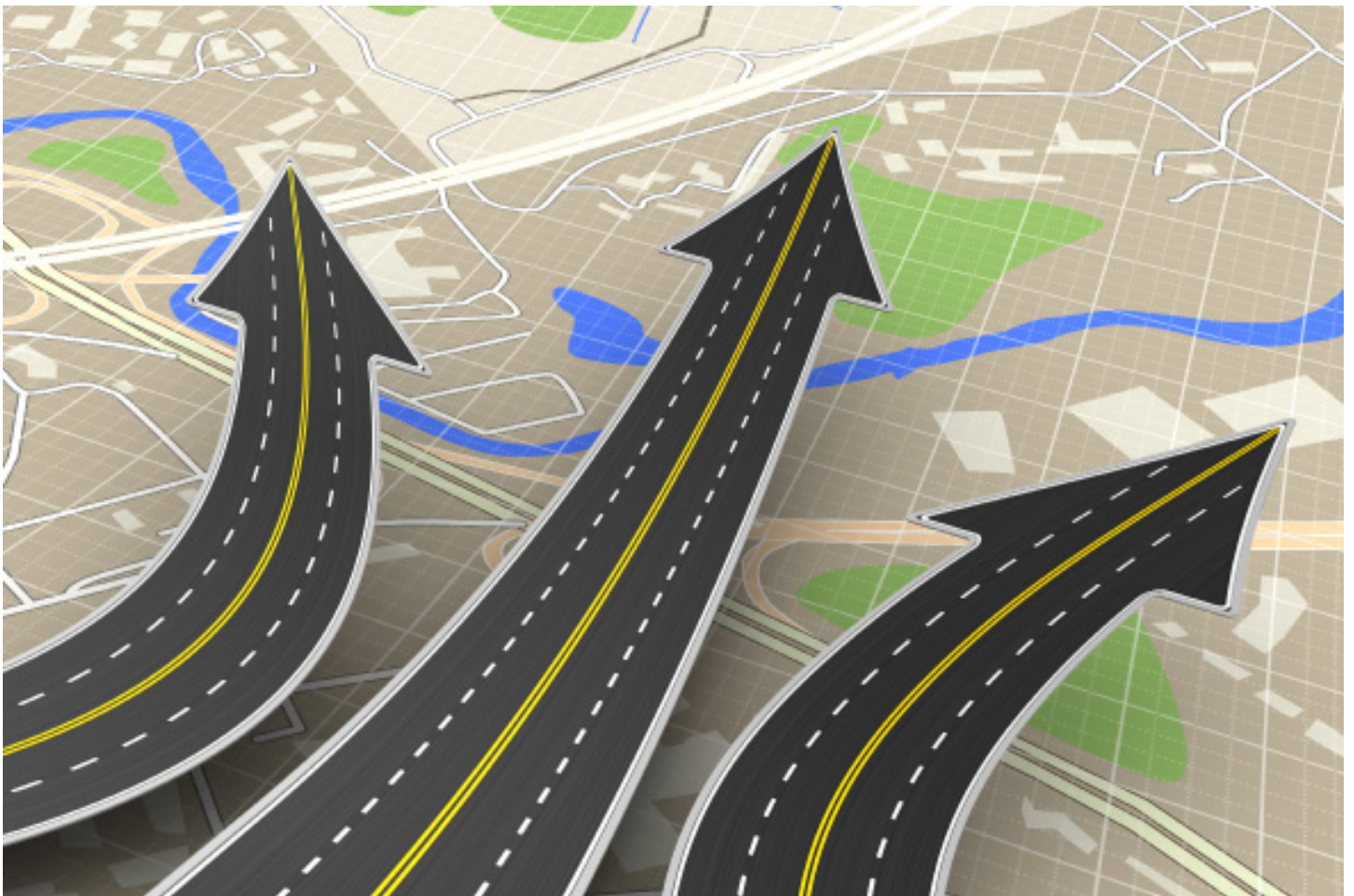




Family Name \_\_\_\_\_



Date \_\_\_\_/\_\_\_\_/\_\_\_\_

# A ROADMAP TO OUR RELATIONSHIP



## GOAL IDENTIFIER

Through the course of our evaluation, we have identified the possible goals and/or their components that may need to be addressed in your personalized financial plan. Proper financial planning typically involves having other qualified professionals provide certain services, such as an attorney to provide legal advice or a tax professional for specific tax advice. For the goals identified below, we will discuss when another professional may be needed. Please identify the timeline, if any, in which you would like to address these goals.

IDENTIFIED	 ESTATE AND LEGAL PLANNING GOALS	CLIENT PRIORITY
	Establish/Review/Update Estate Planning Documents	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Planning for a Special-Needs Situation	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Planning for Asset-Protection for Heirs	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Provide for Heirs from a Prior Marriage	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Plan to Pass a Vacation Home to Heirs	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Evaluate Rental Property Plan	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Develop or Update Pre/Post Nuptial Agreements	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Develop or Update a Plan for Passing on Qualified Assets	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Address a Business in the Estate Plan	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Develop or Update an Estate Plan for Charitable Interests	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Address Non-Citizen Issues	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Address Titling of Assets	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Develop or Update a Gifting Strategy	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Review Beneficiary Designation Forms	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
IDENTIFIED	 TAX PLANNING GOALS	CLIENT PRIORITY
	Evaluate using a Qualified Charitable Distribution	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Evaluate Roth Conversion Opportunities	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Develop or Update a Tax Reduction Plan	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Develop or Update an RMD Strategy	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Evaluate Tax Planning Opportunities for a Family Business	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Evaluate Itemized Tax Deduction Opportunities	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never

IDENTIFIED	 INSURANCE PLANNING GOALS	CLIENT PRIORITY
	Evaluate Individual vs. Employer Sponsored Insurance	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Review Life Insurance Coverage for Premature Death	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Review Old Life Insurance Policies & In-Force Illustrations	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Review/Develop an Insurance Plan for Business Transition	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Review/Develop an Insurance Plan for Long-Term Care	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Review/Develop an Insurance Plan for Disability	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Review Property and Casualty Insurance Coverage	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Review Health Insurance Plan/Medicare Supplemental Plans	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Review Selling and/or Transferring Existing Life Insurance	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
IDENTIFIED	 INCOME PLANNING GOALS	CLIENT PRIORITY
	Review the Impact of Inflation on the Plan	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Stress Test Current Cash Flow	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Develop or Update a Retirement Cash Flow Plan	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Plan for Income After the Death of the First Spouse	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Plan for When to Take Social Security	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Evaluate Optimal Pension Election Options	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Review Existing Annuities and/or Riders	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
IDENTIFIED	 INVESTMENT PLANNING GOALS	CLIENT PRIORITY
	Evaluate Risk Tolerance and Capacity	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Evaluate Asset Allocation	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Evaluate Returns for Current Level of Risk	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Conduct a Portfolio Review	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Review Investment Expenses	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never

IDENTIFIED	MISCELLANEOUS GOALS & DISCUSSION POINTS	CLIENT PRIORITY
	Review/Develop a Debt Retirement Plan	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Evaluate College Planning/Funding	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Review/Develop a Dependent Care Plan	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
	Address Veterans Benefits/Medicaid Planning	<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never
		<input type="checkbox"/> Now <input type="checkbox"/> Later _____ <input type="checkbox"/> Never

**ADDITIONAL PROFESSIONALS REQUESTED**

- Attorney                       Tax Professional                       \_\_\_\_\_                       \_\_\_\_\_  
 Have your own professional?                       Need a referral?

**FINANCIAL PROFESSIONAL**

Printed Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_ / \_\_\_ / \_\_\_

**Client 1**

Printed Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_ / \_\_\_ / \_\_\_

**Client 2**

Printed Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_ / \_\_\_ / \_\_\_

This meeting was conducted remotely and signatures were not obtained.

**DISCLOSURE**

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