

Name:

Date:

Brain Dump: Looking at Retirement

Let us help you articulate your situation. Put a check beside any that apply to you:

<input type="checkbox"/> I have things to look forward to in retirement.	<input type="checkbox"/> I worry I will outlive my money.	<input type="checkbox"/> I do not know how to withdraw from my retirement in a tax efficient manner.
<input type="checkbox"/> I am stressed about finances.	<input type="checkbox"/> I have no strategy to overcome obstacles.	<input type="checkbox"/> I need help with budgeting on a fixed income.
<input type="checkbox"/> I have undefined goals.	<input type="checkbox"/> I want to take a big vacation.	<input type="checkbox"/> I am worried about estate taxes.
<input type="checkbox"/> If I work longer, will it be beneficial?	<input type="checkbox"/> I am not sure why I save money.	<input type="checkbox"/> I have unfinished estate plans.
<input type="checkbox"/> I have aging parents I need to care for.	<input type="checkbox"/> I do not know how Medicare and the supplements apply to me.	<input type="checkbox"/> My home is set up to "age in place." I plan on living here forever.
<input type="checkbox"/> I do not write down goals.	<input type="checkbox"/> My insurance coverage is adequate.	<input type="checkbox"/> I have inadequate emergency savings.
<input type="checkbox"/> My money is allocated in the wrong investments.	<input type="checkbox"/> I am afraid to spend money.	<input type="checkbox"/> I think about part time employment in my area of expertise.
<input type="checkbox"/> I am not sure when to draw social security.	<input type="checkbox"/> I need to think about a change in living arrangements before health problems arise.	<input type="checkbox"/> I would like to set aside funds to help my children.
<input type="checkbox"/> I do not identify obstacles to my goals.	<input type="checkbox"/> I pay high taxes.	<input type="checkbox"/> I would like to invest more.
<input type="checkbox"/> I spend more than my retirement income allows.	<input type="checkbox"/> I have health problems.	<input type="checkbox"/> I have too many accounts/advisors.

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