

Name:
 Date:
 Date of Appointment:

Brain Dump: Retired

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"/> The current income set up is adequate.
<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 need to set aside funds for a larger purchase.	<input type="checkbox"/> I want to take a big vacation.	<input type="checkbox"/> I am worried about estate taxes.
<input type="checkbox"/> I have a family and friend support system.	<input type="checkbox"/> I would like to volunteer more.	<input type="checkbox"/> I have unfinished estate plans.
<input type="checkbox"/> I have aging parents I need to care for.	<input type="checkbox"/> The care of my property is getting to be overwhelming.	<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"/> I worry about how my heirs will handle my retirement funds.	<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 money for kids and grandkids education.
<input type="checkbox"/> I do not identify obstacles to my goals.	<input type="checkbox"/> I may need to think about hiring someone for housekeeping and errands.	<input type="checkbox"/> I have a Power of Attorney and Living Will.
<input type="checkbox"/> I spend more than my retirement income may allow.	<input type="checkbox"/> I have health problems.	<input type="checkbox"/> I think about moving closer to family.

BluePrint Financial Planning
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