**First Planning Meeting Quiz**

These are lists of basic financial goals and concerns. Please rank the importance of each item starting with “1” as the highest priority.

Couples; please complete these separately (no peeking) although you can compare answers afterwards. This may seem silly at first but it helps financial harmony if your responses don’t stay too far apart.

**Goals (rank 1 through 7):**

\_\_\_\_ Enjoying a secure, independent retirement

\_\_\_\_ Helping educate or support family members

\_\_\_\_ Supporting my church or favorite charities

\_\_\_\_ Keeping my existing financial advisor

\_\_\_\_ Leaving a legacy for my family and/or community

\_\_\_\_ Making a major purchase (second home, property, RV, luxury item, etc.)

\_\_\_\_ Something important to you: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Concerns (Rank 1 through 7):**

\_\_\_\_ Market Volatility

\_\_\_\_ Running out of money in retirement

\_\_\_\_ Inflation and healthcare costs

\_\_\_\_ Social Security and Medicare solvency

\_\_\_\_ Taxes

\_\_\_\_ Protecting my loved ones financially

\_\_\_\_ Something of concern to you: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**First Meeting Extra Credit:**

This list is part of the formal planning questionnaire but some items also make handy talking-points when we meet. You don’t need to bring them in but please take a quick look to remember topics you want to discuss.

* Retirement plan statements
* Brokerage statements
* Bank statements
* Last year’s tax forms

• Real estate holdings (value, type, loans, ownership structure)

* Wills, trusts, medical directives and powers-of-attorney

• Other liabilities

• Personally held businesses

* Expected (or current) retirement income

• Educational goals

• Philanthropic goals

• Major future purchases

• Possible future inheritances

• Obligations to family or special needs relationships

• Stock options or deferred compensation agreements

• Life insurance

• Health, disability and long-term care insurance

• Personal liability coverage

Estimated retirement income needs in today’s dollars minus taxes and mortgage payments (which we’ll calculate separately) $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

For couples; do you make financial and investment decisions together?

Yes No

How would you rate your investment knowledge? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_