

As discussed, you will likely encounter a number of strengths, weaknesses, dangers and opportunities over the next three years. We have been privileged to share in the plans of a great number of our clients with a wide range of concerns and objectives. The following list is intended to assist you to identify concerns that are important to you but may have been overlooked in our discussions. *Please take a moment to check off those items of concern to you.*

| | Personal Concerns | | Financial Concerns |
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| | Lack of an up-to-date Will | | Inconsistency in managing financial affairs |
| | Lack of Powers of Attorney | | Accounting for money flow |
| | Estate Planning | | Lack of a defined investment strategy |
| | Tax Planning | | Managing Debt |
| | Charitable Giving | | Eliminating mortgage(s) |
| | Health Care | | Prudent allocation of excess earnings |
| | Personal Disability or Critical Illness | | Erosion of capital due to illness or accident |
| | Long Term Care | | Sale of business |
| | Loss of employment | | Sale of family home |
| | Finding a new direction | | Sale of parents' home |
| | Long term academic direction | | Sale of family farm |
| | Buying a home or vacation property | | Sale of family cottage |
| | Pre-planning / pre-paying funeral arrangements | | Investing proceeds from the sale of a business/home/cottage |
| | Care of elderly parents | | Loss of capital |
| | Care of challenged siblings or children | | Adequate income for retirement |
| | Planning for Retirement | | Intergenerational wealth transfer |
| | | | Settling the affairs of an estate |
| | | | Settling the affairs from the sale of U.S. or foreign properties |
| | Other: | | Other: |

| My Most Urgent Concerns |
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The Financial Coach's Unique Value Proposition:
 The Financial Coach provides quiet confidence through sound planning based on accumulated knowledge and care of your unique situation.