



**Please Rate the Importance of the Following:**

Low-High

- Your retirement goals ○ ○ ○
- Having all of your portfolios consolidated and analyzed to make sure your overall plan is on track ○ ○ ○
- Directing a portion of your personal savings or investment portfolio to a tax advantaged vehicle ○ ○ ○
- Matching your risk tolerance to that of your investment portfolio ○ ○ ○
- Reviewing your investment performance against that of an index ○ ○ ○
- Reviewing your investment performance against your plan ○ ○ ○
- Minimizing the taxes on your investment accounts ○ ○ ○
- Reviewing techniques to save income tax and estate taxes on deferred money ○ ○ ○
- Asset protection in the result of serious illness ○ ○ ○
- Protecting assets in the event that you require long term care in the future ○ ○ ○
- Receiving adequate income in the event of a disability in your working years ○ ○ ○
- Planning for income for your spouse in the event of your premature death ○ ○ ○
- Generating a guaranteed retirement income stream ○ ○ ○
- Planning income for your children in the event of your premature death ○ ○ ○