



# Retirement Priority Planning Review

A Brief Overview of Your Financial Plans and Priorities

Prepared for:



This fact finder serves to help identify your financial needs and priorities and may be used in developing proposed solutions consistent with your needs and objectives. In completing this fact finder, you are entrusting our organization with certain personal and confidential financial data. We recognize that our relationship with you is based on trust and we hold ourselves to the highest standards in the safekeeping and use of your confidential information.

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Provided by:



## Personal Information

Please complete only the information that may not be in our current records.

Name: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Business Phone: \_\_\_\_\_

Personal E-Mail: \_\_\_\_\_ Business E-Mail: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_ Business Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

## Personal Planning Profile

Please check the boxes that reflect your current planning.

Yes No ?

I know how long my retirement income will last.

I am concerned about the risk of outliving my retirement income.

I am pleased with the returns on my retirement and investment programs.

I understand the impact of inflation on my retirement plan.

I pay taxes on my Social Security benefits.

I am fully covered for health care costs: Medicare A and B as well as "Med Sup."

I am familiar with costs of long-term care and nursing home costs.

I have reviewed my life insurance program in the last two years.

I have a current will consistent with my estate distribution wishes.

I have advance directives (living will, medical power of attorney) consistent with my wishes.

I am concerned about estate taxes.

I am concerned about my final expenses.

I want to leave something to my: children, grandchildren, church, alma mater, charity.

## Financial Statement

Please check the boxes that best reflect your current situation.

### Income

Your Annual Income

Spouse's Annual Income

Less than \$50,000  
 \$50,000 to \$100,000  
 \$100,000 to \$250,000  
 More than \$250,000

### Assets (excluding home)

Less than \$50,000      \$250,000-\$500,000  
 \$50,000-\$150,000      \$500,000-\$1,000,000  
 \$150,000-\$250,000      More than \$1,000,000

Value of Home: \_\_\_\_\_

### Liabilities (excluding home mortgage)

Less than \$25,000      \$150,000-\$250,000  
 \$25,000-\$75,000      \$250,000-\$500,000  
 \$75,000-\$150,000      More than \$500,000

Home Mortgage: \_\_\_\_\_

### Current Savings and Investments

Savings and CDs  
 Money Market Fund  
 Mutual Funds  
 Stocks

Bonds  
 Life Insurance Cash Value  
 Tax-Deferred Annuity  
 IRA or SEPP

401(k) Salary Deferral  
 Pension/Profit Sharing Plan  
 Other: \_\_\_\_\_  
 Other: \_\_\_\_\_

### Current Life Insurance

Your Total

Spouse's Total

Less than \$50,000  
 \$50,000 to \$150,000  
 \$150,000 to \$500,000  
 More than \$500,000  
 Long Term Care Insurance



## Financial Planning Priorities

Please check the boxes that most closely reflect your financial priorities.

*H = High Priority*    *M = Medium Priority*    *L = Low Priority*    *N/A = Not Applicable*

**H   M   L   N/A**

- Returns made on my retirement assets are a...
- Effect of inflation on my assets is a...
- Risk of outliving my retirement income is a...
- Providing funds to pay my mortgage and debts in the event of my death is a...
- Protecting against the costs of long-term health care is a...
- Investing money in tax-favored plans is a...
- Low risk investments are a...
- Investments that offer high growth potential are a...
- An overall financial plan is a...
- Review of all my insurance policies is a...
- Availability of additional health care coverage is a...
- Income from real estate including residence is a...
- Involvement of my spouse in our financial planning is a...

## Current Priorities

Please check all items you are interested in discussing:

- |                                     |                                                       |
|-------------------------------------|-------------------------------------------------------|
| A complete financial analysis       | Supplemental health insurance                         |
| Better return on retirement assets  | Income from real estate including residence           |
| Guaranteed lifetime income.         | Protecting against the costs of long-term health care |
| Insurance on myself                 | Methods of charitable giving                          |
| Insurance on my spouse              | How to pay estate taxes                               |
| Insurance on children/grandchildren | Existing policy review                                |
| Converting temporary insurance      | Other pertinent information:                          |
| Mortgage protection coverage        |                                                       |

## Future Plans

Please check all items that may apply within the next two years:

- |                  |               |             |
|------------------|---------------|-------------|
| New home         | Vacations     | Inheritance |
| Charitable gifts | Sell property | Retirement  |
| Relocation       | Other:        | Other:      |



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