



Wealth Plan Maintenance Questionnaire

For each question below, please choose "YES" if there has been a change since the completion / maintenance of your Wealth Plan or if you anticipate a change.

		YES	NO
1.	Have you opened any new financial accounts? <i>(bank, investment, retirement, etc.)</i>		
2.	Have you taken out any new loans or mortgages?		
3.	Have you paid off any loans or mortgages?		
4.	Have you retired or changed jobs?		
5.	Has your income changed? <i>(new source, substantial increase or decrease)</i>		
6.	Have your living expenses changed? <i>(See Fact Update for current expenses; blank worksheet attached)</i>		
7.	Have your retirement goals changed?		
8.	Have you added any children or grandchildren to your family?		
9.	Have you made any major purchases? <i>(new home, vacation home, land, automobile, boat, etc.)</i>		
10.	Have you sold any real estate or personal property?		
11.	Have you purchased or started a new business?		
12.	Have you sold a business?		
13.	Have you purchased, changed, or cancelled any liability, life, disability, or long-term care insurance policies?		
14.	Have your estate distribution goals changed? <i>(death of a beneficiary, new beneficiary, new charitable interests, etc.)</i>		
15.	Have you executed any new estate planning documents? <i>(wills, trusts, powers of attorney, etc.)</i>		
16.	Have you received an inheritance?		
17.	Are there any other changes to your financial situation or goals that may affect your planning?		

If "YES" was selected for any question above, please provide details on the following page or copies of documents as necessary.

Provide details here and attach additional pages or copies of documents as necessary: