

Evaluating Where You Are in Your Planning

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| Evaluation #1: We have thoroughly vetted our inflation adjusted retirement income needs and have vetted how much money we need to provide that income. | 1...2...3...4...5...6...7...8...9...10 |
| Evaluation #2: We have a thorough understanding of all investment choices and know how to create a plan to maximize our retirement income need. | 1...2...3...4...5...6...7...8...9...10 |
| Evaluation #3: We have a thorough knowledge of every tax planning strategy so that we pay the minimum taxes owed. | 1...2...3...4...5...6...7...8...9...10 |
| Evaluation #4: We understand how to become a value investor to help maximize our income and growth. | 1...2...3...4...5...6...7...8...9...10 |
| Evaluation #5: Our advisors have years of experience and education on every tax planning strategy. | 1...2...3...4...5...6...7...8...9...10 |
| Evaluation #6: All our advisors work together and are on the same page on our finances and estate plan. | 1...2...3...4...5...6...7...8...9...10 |
| Evaluation #7: Both my spouse and I are totally familiar with our current financial situation, what our current “estate plan” does and are both on the same page regarding what it will do. | 1...2...3...4...5...6...7...8...9...10 |
| Evaluation #8: We have fully disclosed to our heirs all the details of our inheritance plans for them and as a family are all in full support of the overall plan. | 1...2...3...4...5...6...7...8...9...10 |
| Evaluation #9 Our heirs are fully prepared spiritually, emotionally, and financially to receive the inheritance we have determined is appropriate for them. | 1...2...3...4...5...6...7...8...9...10 |
| Evaluation #10: Our children are well educated on finances and taxes so that they create sound planning for their family. | 1...2...3...4...5...6...7...8...9...10 |

Total Number _____

Your Planning Evaluation

- 10 – 50 – You need to get serious about planning!
- 51 – 70 – You have done some good planning, but a great deal of additional work still needs to be done.
- 71 – 85 – You are well on your way. Creative fine tuning will help maximize your planning outcomes.
- 86 – 100 – You should write a book and be leading workshops. Great job!