



Rank your current needs from 1 (Highest) to 9 (Lowest)

- ___ Lowering taxable income
- ___ Protecting retirement savings
- ___ Increasing retirement savings
- ___ Loss of income due to disability
- ___ Debt and income relief for surviving dependents
- ___ Long-term care costs
- ___ Avoiding probate
- ___ Avoiding estate taxes (FOR ESTATES OVER \$1,000,000)
- ___ Increasing estate size for beneficiaries

Circle your current level of concern:

Inflation: Having your savings and investments keep pace with inflation (~3.2%)
 Low 1 2 3 4 5 6 7 8 9 HIGH

Safety: Losing money in your investments.
 Low 1 2 3 4 5 6 7 8 9 HIGH

Liquidity: What percentage of your investments do you need available annually?
 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Lifestyle: Your current protection your family from loss of income.
 Low 1 2 3 4 5 6 7 8 9 HIGH

Lifestyle: The cost of nursing or assisted living care.
 Low 1 2 3 4 5 6 7 8 9 HIGH

Wealth: Leaving a large estate for your beneficiaries.
 Low 1 2 3 4 5 6 7 8 9 HIGH

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