



Control Your Financial Future Understanding how well you are positioned to be in control of your financial future enables you to make better decisions. Use our checklist below to see how your current situation rates in key financial areas.

PERSONAL FINANCIAL FITNESS

	Yes	No	Not Sure
I have a detailed financial plan that fits my needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I know where all of my assets are located.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My portfolio is diversified.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I know the rate of return on my investments.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have an understanding of my financial risk and am comfortable with it.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My earned income and investments generate enough cash for my spending needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have financial situations that require immediate attention. <i>(i.e. college funding, change of jobs, retirement)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I understand tax strategies that are appropriate for me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have the appropriate insurance coverage. (Check all that apply)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/> Long-Term Care <input type="radio"/> Disability			
<input type="radio"/> Life (Whole/Term) <input type="radio"/> Health			

RETIREMENT

	Yes	No	Not Sure
I am on track to retire in _____ (year).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I know where my income will come from in retirement.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My financial future is secure to sustain my lifestyle.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am maximizing my retirement savings options.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am comfortable and satisfied with my company's retirement plan.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ESTATE PLANNING

	Yes	No	Not Sure
My estate documents are complete and current. (Check all that apply)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/> Will/Trust <input type="radio"/> HIPAA Waivers			
<input type="radio"/> Living Will <input type="radio"/> Powers of Attorney - Financial and Health care			
My estate is designed to minimize taxes and fees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

MY FINANCIAL TEAM

	Yes	No	Not Sure
My current financial advisor is the right fit for me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have a coordinated plan between my professional advisor. <i>(i.e. financial advisor, accountant and lawyer)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I know and am comfortable with the fees I am paying.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>