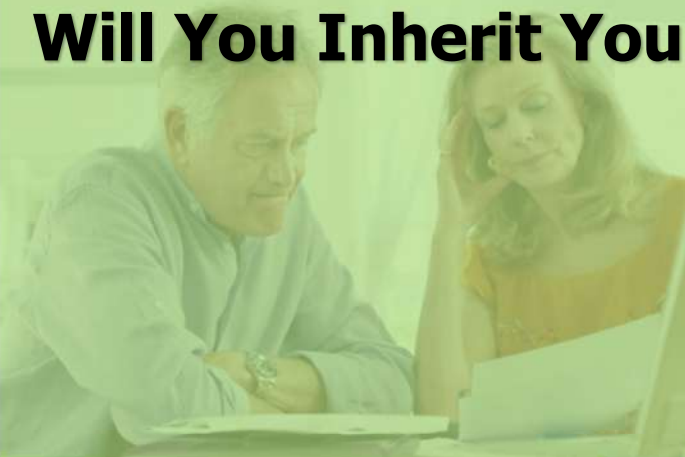


Will You Inherit Your Parent's Financially?



Will Your Kids Inherit YOU Financially?

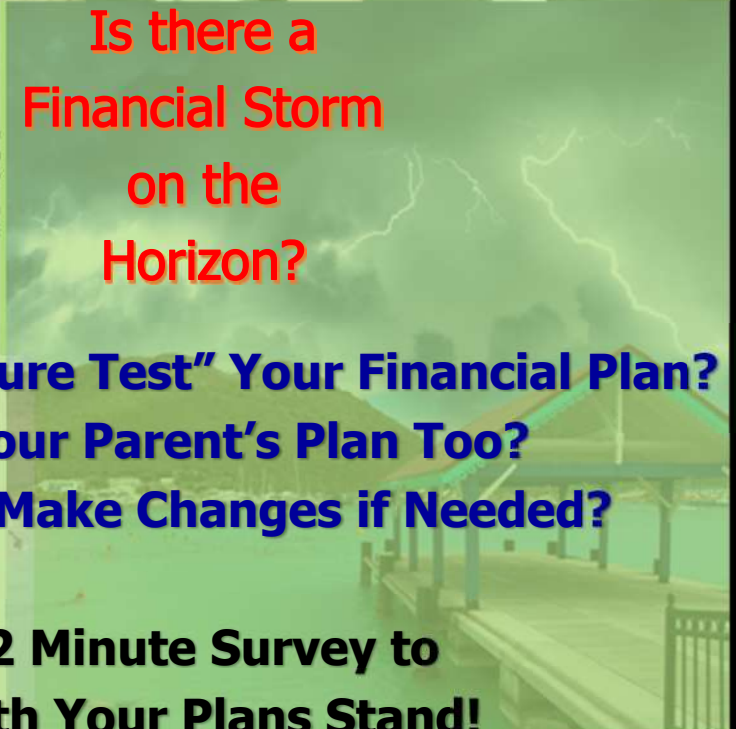
How Big
Is Your
Retirement
Shortfall?



Is there a
Financial Storm
on the
Horizon?

Isn't NOW the time to "Pressure Test" Your Financial Plan?
Shouldn't You Test Your Parent's Plan Too?
Before it is TOO LATE to Make Changes if Needed?

Take our QUICK-2 Minute Survey to
Find Out Where Both Your Plans Stand!





"Pressure Test" Your Financial Plan	Yes	No
1. Do you have a documented financial plan, updated at least annually to adjust for changing circumstances, economic conditions and newest financial solutions?		
2. Was the appropriate age-specific inflation indexing used in creating and funding your retirement income plan?		
3. Has the plan been created to expire BEYOND your statistical life expectancy?		
4. Does your retirement plan deliver the guaranteed living expense "paychecks" and lifestyle "playchecks" to meet your family's financial needs?		
5. Have the long-term care expenses been accounted for in the plan—so as to prevent you from becoming a financial burden on your children in your later years of life?		
6. Does your life insurance program include funding for critical, chronic, and terminal illness—as opposed to just being payable at end of life?		
7. Does your estate plan include "values guidelines" to enshrine positive living principles in your final wishes?		
8. Has a Family Meeting been professionally facilitated to document agreement among family members on asset sharing, financial roles among siblings and long term logistical arrangements for parental care?		
9. Have you secured your children's future insurability at today's favorable pricing and tax efficient rates?		
10. Has an Estate Directory been completed and are the executors aware of its whereabouts?		
TOTAL SCORE: If your total YES score falls anywhere below 10, you would be strongly advised to meet with a financial professional to discuss the gaps uncovered by this questionnaire.		