**What’s Important to You?**

**Please check the three items that are the most important to you.**

* Make a significant capital purchase (retirement property, buy a business, etc.)
* Restructure or eliminate my debt
* Save enough now so I can retire comfortably later
* Have a financial plan now to ensure my savings last me through my current retirement
* Determine where and how to withdraw funds from investments to provide my retirement income
* Review the ‘big picture’ to ensure I have tax-efficient strategies
* Reduce income taxes generated from my investments
* Review my investment portfolio to make sure it is aligned with my goals
* Review my investment portfolio to make sure it is aligned with my risk profile
* Help with a retirement rollover or severance I am receiving
* Guidance on how to invest proceeds of a significant life event (i.e. insurance proceeds, inheritance, sale of business)

Your Current Critical Financial Events

* Family security in the event of premature death or a disability
* Family securing in the event of critical illness
* Provide for education of children or grandchildren
* Care for those dependent on me (i.e. special needs family members, aging parents, other)
* Legacy planning for my estate
* Provide capital for the charitable organizations that I support
* Update my business planning through insurance and/or partnership agreements
* Create a succession plan for my business
* Protect my assets from creditors and liability lawsuits
* Advice on how to best manage the proceeds from sale of my business
* Guidance on how to best manage my large corporate stock positions
* Avoid capital gains or excessive taxes on the sale of business interests
* Position myself to enjoy more of the things in life I value
* Having peace of mind and a sense of security regarding my financial future
* Other (specify):