

## A SHORT SURVEY

If you had an Insurance and Financial Service Advisor, what would be the most important information they could provide you?

1. Would it be - updated benefits and rates for group or individual health insurance? Children only insurance? Referrals for car and homeowners insurance.
2. Ways to decrease your taxes? (IRA - Roth - SEP - 401K)
3. Ways to increase your investments without paying tax on the increase? (Non-qualified annuities)
4. Looking at what's available for 403B's, 401K's, SEP's, IRA's & Roth? (Different programs for different needs)
5. Ways to protect your income for yourself and your family in the event you couldn't work and/or died? (Disability income and life insurance)
6. Money to provide for Long Term Care for Home, Nursing Home, or Assisted Living?
7. What is your biggest financial worry?
8. Do you have adequate 

Life Insurance, Health Insurance Disability Income, Long Term Care Annuities Retirement Plans
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9. Have you paid over 20% on your home mortgage so you no longer need the coverage that only protects your lender? If so, stop that coverage and get mortgage protection which protects you. (Buying a new home - need referrals to mortgage banker and realtors?)

Date \_\_\_\_\_ Signature \_\_\_\_\_

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My Short Term Goal is: (1-5 years)

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My Long Term Goal is (15 years plus)

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What kind of lifestyle do you want to create for yourself & your family?

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