PERSONAL FINANCIAL CHECK-UP

ANNUAL INCOME

[ ] under $100,000
[ ] $100,000 - $200,000
[ ] $200,000 - $300,000
[ ] $300,000 - $600,000
[ ] $600,000 - $1,000,000
[ ] over $1,000,000

APPROXIMATE NET WORTH (excluding home)

[ ] under $500,000
[ ] $500,000 - $750,000
[ ] $750,000 - $1,000,000
[ ] $1,000,000 - $2,500,000
[ ] $2,500,000 - $10,000,000
[ ] over $10,000,000

YES	NO	Have you had a comprehensive Financial Plan completed and implemented for you within the last 90 days?
YES	NO	Have you had a comprehensive investment review in the last 90 days?
YES	NO	Are you on track for your retirement goals?
YES	NO	Are you interested in personal tax reduction strategies?
YES	NO	Do you have a will/trust in place that is funded?
YES	NO	Has your will or trust been reviewed or updated in the last year?
YES	NO	Have you placed your assets in your trust?
YES	NO	Have you had your personal insurances reviewed by an insurance specialist?
YES	NO	What is your current Mortgage Rate? %
YES	NO	Have you heard of an interest-only loan?
YES	NO	Have you had your personal P&C insurance coverage reviewed in the last 90 days?
YES	NO	Do you feel you are paying too much for your P&C?
YES	NO	Have you protected your estate and family against aging health care costs and needs?
YES	NO	Are your assets protected against judgments, lawsuits and bankruptcy?
YES	NO	Are your life insurance policies more than two years old?
YES	NO	Does your spouse participate in planning your financial affairs?
YES	NO	Would you participate in the stock market if there were zero chance of loss?
YES	NO	Do you have cash flow and budgeting planning in place?

What financial issue is the biggest concern to you?

What other issues are of concern to you?

CONFIDENTIAL FINANCIAL CHECK-UP

SCOTT D. PHILLIPS, CFP.

The 15-minute financial overview.

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No one plans to fail,
They just fail to plan.