2011 Financial Fitness Checkup

Now is the perfect time to look at various aspects of your life and develop a plan to improve your financial fitness. Below you'll find a list of questions that may have an impact on your financial health in 2011 and beyond. Please check each question with a "yes" or "no" and write in any appropriate comments. Then call our office to schedule your Financial Fitness Checkup.

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Your Family

Yes	No		Notes
☐	☐	Do you expect any changes in your relationship status: marriage, cohabitation, divorce?	
☐	☐	Do you expect any changes in family composition: birth, adoption?	
☐	☐	Do you have a child who will be going to college this year?	
☐	☐	Do you have a child or dependent with special needs?	
☐	☐	Do you have any adult children who have moved back home or are otherwise in need of financial support?	
☐	☐	Do you have an elderly parent in need of financial or care-giving support?	

Your Goals			
Yes	**No**		**Notes**
☐	☐	Have your goals changed in the last year?	
☐	☐	Are you planning a major vacation in 2011?	
☐	☐	Are you planning on making a significant purchase, such as a boat, real estate, or collectible?	
☐	☐	Are you planning a major renovation to your home?	
☐	☐	Are you planning to move this year?	
☐	☐	Are you planning on buying or selling a vacation home?	
Your Business (skip if not applicable)			
☐	☐	Are you thinking of starting a new business?	
☐	☐	Are you planning on expanding your business?	
☐	☐	Are you planning on selling your business?	
☐	☐	Will you have to lay off employees this year?	
☐	☐	Do your employees need a health plan?	
☐	☐	Do you or your employees need a retirement plan?	
☐	☐	Do you or your key employees need life insurance (or a review of your current policies)?	
Your Work (skip if not applicable)			
☐	☐	Do you or your spouse anticipate changing jobs in 2011?	
☐	☐	Are you or your spouse worried about the security of your job(s)?	
☐	☐	Will your total compensation change very much from 2010 levels?	
☐	☐	Will your employee benefits change this year?	
☐	☐	Do you or your spouse plan to retire this year?	
Your Health			
☐	☐	Do you or a close family member have a serious illness?	
☐	☐	Are you worried about the adequacy of your health care coverage in 2011?	

Yes	No		Notes
☐	☐	Do you expect your out-of-pocket healthcare costs to rise in 2011?	
☐	☐	Are you enrolled in, or will you be enrolling in, Medicare in 2011?	
☐	☐	If yes, do you need help finding supplemental coverage?	
☐	☐	Have you noticed significant signs of aging in yourself or a family member (forgetfulness, frailty)?	
☐	☐	Do you need help completing an advance directive for healthcare, in the event you become unable to make medical decisions for yourself?	
Your Money			
☐	☐	Do you have any concerns about your investment portfolio?	
☐	☐	Would you like help drafting a spending/saving plan?	
☐	☐	Are you thinking about refinancing your mortgage?	
☐	☐	Are you looking to reduce your taxes?	
☐	☐	Do you expect to come into some money this year?	
☐	☐	Are you concerned about inflation?	
☐	☐	Do you worry about debt?	
☐	☐	Do you and your spouse ever disagree about money?	
Your Estate			
☐	☐	Will your net worth total more than $1 million in 2011?	
☐	☐	Will you make any substantial charitable gifts this year?	
☐	☐	Are there any trusts you need to fund?	
☐	☐	Are your life insurance policies more than 5 years old?	
☐	☐	Do you need to update your will?	
☐	☐	Do you need to update your list of beneficiaries?	
☐	☐	Would your spouse have problems managing the finances if you were to die first?	

Your Retirement			
Yes	**No**		**Notes**
☐	☐	Do you have any leftover retirement accounts held by former employers?	
☐	☐	Would you like guidance in taking full advantage of your company's retirement benefits?	
☐	☐	Do you anticipate needing to borrow or withdraw funds from your retirement accounts in 2011?	
☐	☐	Would you like to increase how much you save for retirement?	
☐	☐	Do you need help understanding IRA required minimum distributions as they relate to your own or an inherited IRA?	
Your Future			
☐	☐	Do you need help getting financially organized?	
☐	☐	Could you get by for 6 months without dipping into retirement or other long-term accounts?	
☐	☐	Do you anticipate any significant life changes in the next five years (move, retirement, etc.)?	
☐	☐	Have you been thinking about when you should apply for Social Security?	
☐	☐	Do you feel stressed about your finances?	
☐	☐	Do you have a "bucket list"?	

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