



◀ PROPERTY
LEGACY ▶



RETIREMENT ▶



DREAMS ▲

FAMILY ▲
▼ EDUCATION

AUTO ▲



LET'S TALK ABOUT YOU



INCOME ▲
◀ FINANCES



▲ LIABILITIES
DEBT MANAGEMENT ▶



It's your life. Your hopes, challenges, goals, and dreams.
That's why we always ask: "What's important to **you**?"

HEALTH ▲



FAMILY

If you weren't around, would your family be okay financially?

Any chance you'll be caring for elderly parents or others?

Do you have life insurance? Is it the right type and amount?

DREAMS

What are your long-term goals or plans?

What causes or concerns are close to your heart?

Are you thinking about traveling or a second home?

LEGACY

What would you like to leave as your legacy?

Have you done any estate planning?

Any causes or charities you hope to support?

PROPERTY

Are you happy in your current home or thinking about a move?

Any prized possessions that need extra protection?

Any large purchases planned?

RETIREMENT

What does retirement look like to you?

How are you saving for retirement?

Do you feel like you'll have enough money when it's time to retire?

AUTO

What are you driving today? Are you planning to upgrade soon?

Any new drivers in the family?

Any other vehicles that need protecting—motorcycles, boats, etc.?

EDUCATION

Is college or private school in anyone's future? What about continuing education or training?

Have you looked into financial aid or education savings plans?

Are you paying any student loans?

LET'S TALK ABOUT YOU

INCOME

Are you anticipating any job changes, salary changes, or new sources of income?

Can you afford to set aside a little more each month?

If you got sick or hurt or lost your job, could you make ends meet?

HEALTH

How's your current health coverage?

Are you prepared for any unexpected health issues?

Have you thought about long-term care coverage?

FINANCES

How's your emergency fund?

How are your investments doing?

What kind of savings plans does your employer offer? Are you taking advantage of them?

LIABILITIES

Are you prepared to deal with an accident, injury, or damage?

Do you feel like you have enough protection?

What would happen if you got hit with a major claim or lawsuit?

DEBT MANAGEMENT

Any debts you'd love to pay off or consolidate?

Do you know what you spend on common items like food and clothing?

Are you tracking and recording your spending on a regular basis?

