



Annual Review Planner

Prepared for:

Provided by:

Please complete the following checklist and return it to me by _____. Your comments will help me determine how I can best be of service to you during our upcoming meeting. Please be assured the information will be kept in strictest confidence and added to your file.

Since the last review of my financial security program I have:

Changed my residence or business mailing address.

Changed jobs.

Changed my will.

Changed my marital status.

Experienced a change in my family: Increase Decrease

Entered into a new business.

Acquired additional life insurance: Group Other

Acquired additional: Disability insurance Medical insurance

Equity investments

I would like more information on:

Tax savings available by use of a tax-qualified retirement plan.

Increased protection for my family.

Converting term insurance or term rider to permanent coverage.

Insurance for: Children Grandchildren

Providing college education funds for my: Children Grandchildren

Insurance for my spouse.

Disability income insurance.

Group insurance.

Pension plan.

Key person insurance.

Business buy and sell agreements.

Leaving funds to charity.

Thank you. I have enclosed a return envelope for your convenience.

Notes:

Important Information

This fact finder serves to help identify your financial needs and priorities and may be used in developing proposed solutions consistent with your needs and objectives. In completing this fact finder, you are entrusting our organization with certain personal and confidential financial data. We recognize that our relationship with you is based on trust and we hold ourselves to the highest standards in the safekeeping and use of your confidential information.

The information, general principles and conclusions presented in this report are subject to local, state and federal laws and regulations, court cases and any revisions of same. While every care has been taken in the preparation of this report, VSA, L.P. is not engaged in providing legal, accounting, financial or other professional services. This report should not be used as a substitute for the professional advice of an attorney, accountant, or other qualified professional.

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