Plans and Priorities

A Brief Overview of Your Financial Plans and Priorities

Prepared for:

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 our selves 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 professionals.

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Provided by:

In order to help us serve you better, please let us know your future plans and your current priorities. Simply complete the checklist below and return it to us at your convenience.

Future Plans

Please check all items that may apply within the next two years:

- ☐ New home
- ☐ Change job
- ☐ Lose weight
- ☐ Stop smoking
- ☐ Pay off loans
- ☐ Start business
- ☐ Bonus
- ☐ Salary increase
- ☐ Marriage
- ☐ Children
- ☐ Save more
- ☐ Retirement
- ☐ Inheritance
- ☐ Charitable gifts
- ☐ Sell business
- ☐ Sell property
- ☐ Other:

Current Priorities

Please check all items you are interested in discussing:

- ☐ A financial analysis
- ☐ Planning for retirement
- ☐ Ways to protect my family's lifestyle
- ☐ How to pay estate taxes
- ☐ Mortgage protection coverage
- ☐ Insurance on myself
- ☐ Converting temporary insurance
- ☐ Tax-favored investments/ annuities
- ☐ Ways to protect my income in the event of sickness or accident
- ☐ Insurance on my spouse
- ☐ Insurance on my children/grandchildren
- ☐ Protecting against the costs of long-term health care
- ☐ Methods of charitable giving
- ☐ A systematic savings plan
- ☐ Existing policy review
- ☐ Other pertinent information: