



Financial Planning Objectives

Date: _____	
Client #1: _____	Client #2: _____
Birthdate: _____	Birthdate: _____
Retirement Age: _____	Retirement Age: _____
Email: _____	Email: _____
Phone: _____	Phone: _____

Risk Management	Level of Importance		
	High	Medium	Low
1. Life insurance needs and/or current policy analysis	_____	_____	_____
• I want my spouse to be debt free if I should die	_____	_____	_____
• I want to provide for a college fund should I die	_____	_____	_____
2. Disability needs and/or current policy analysis	_____	_____	_____
3. Long-term care insurance needs and/or current policy analysis	_____	_____	_____
4. Property and Casualty insurance analysis	_____	_____	_____
5. Medical insurance analysis	_____	_____	_____
6. Medicare and Medigap insurance analysis	_____	_____	_____
7. Other _____	_____	_____	_____
Cash Flow Planning			
1. Efficient use of monthly cash flow	_____	_____	_____
2. Ability to save more	_____	_____	_____
3. Tracking my monthly expenditures	_____	_____	_____
4. Other _____	_____	_____	_____
College Planning			
1. Saving for children / grandchildren's college expenses	_____	_____	_____
2. Keeping college funds out of children's control	_____	_____	_____
3. Saving for a private school/college education	_____	_____	_____
4. Other _____	_____	_____	_____



Other	High	Medium	Low
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. Other _____	_____	_____	_____

Please include any additional information you would like us to include.