Lifetime Financial Group

11207 W. Dodge Road, Ste 200 Omaha, NE 68154
402-934-7733 877-934-7733
www.lifetimefg.com

Helping you achieve your lifetime financial goals

This snapshot is designed to accomplish two objectives:
1)The questions will reveal the type of work we do.
2)Your answers will help determine if there is a need for us to meet again.

PERSONAL DATA

Name:

Address:

City: State: Zip:

Cell phone: Other phone:

Age: Occupation:

Marital Status: Spouse/Partner Name:

MY PRIORITIES

Please check: A - Essential, B - Fairly Important, C - Of Little Value or D - Does Not Apply

	A	B	C	D
Involving my spouse/partner in our financial affairs is:	☐	☐	☐	☐
Modifying my lifestyle today for future financial security is:	☐	☐	☐	☐
Owning an investment* portfolio that offers high-growth potential is:	☐	☐	☐	☐
Having a low risk factor in my investments* is:	☐	☐	☐	☐
Replacing my income if I became disabled would be:	☐	☐	☐	☐
Having a current estate plan documented in a will or trust is:	☐	☐	☐	☐
In the event of my death, having any loans and mortgages paid off is:	☐	☐	☐	☐
The ability of my family to maintain their current standard of living upon my death is:	☐	☐	☐	☐
Protecting my estate from unnecessary taxation is:	☐	☐	☐	☐
Not outliving my retirement income is:	☐	☐	☐	☐
Having a financial professional who understands my financial objectives is:	☐	☐	☐	☐

INVESTMENT STRATEGY

Please check the boxes that reflect your present situation.	**Yes**	**No**	**Unsure**	**N/A**
My written financial plan includes defined short, medium and long-term goals.	☐	☐	☐	☐
My investments are properly diversified in terms of risk versus return.	☐	☐	☐	☐
I take advantage of dollar cost averaging.	☐	☐	☐	☐
My portfolio has a good balance between short-term liquidity and long-term growth.	☐	☐	☐	☐
The rate of return on my current financial development program is acceptable.	☐	☐	☐	☐
Restructuring debt can improve my financial situation.	☐	☐	☐	☐
I know how taxation affects the real return on my wealth accumulation.	☐	☐	☐	☐
My retirement income needs and sources of income have been determined.	☐	☐	☐	☐
I am accustomed to paying a fee-based financial advisor.	☐	☐	☐	☐
I would like assistance in reviewing my financial development.	☐	☐	☐	☐

LIFESTYLE PROTECTION

Please check the boxes that reflect your present situation.	**Yes**	**No**	**Unsure**	**N/A**
If I leave my employer, my disability protection continues.	☐	☐	☐	☐
My spouse/partner has sufficient income protection coverage.	☐	☐	☐	☐
If I have a severe accident or illness, I can continue my current standard of living.	☐	☐	☐	☐
I have insurance for long-term care needs.	☐	☐	☐	☐
My spouse/partner and I have sufficient life insurance to maintain our family's lifestyle.	☐	☐	☐	☐
I have a pension plan through my employer.	☐	☐	☐	☐
My spouse/partner's employer provides a pension plan.	☐	☐	☐	☐
I am satisfied that my current lifestyle and income are protected.	☐	☐	☐	☐

ESTATE ORGANIZATION

Please check the boxes that reflect your present situation.	Yes	No	Unsure	N/A
My estate plans and will/trust are current.	☐	☐	☐	☐
A guardian has been appointed for our minor children.	☐	☐	☐	☐
All my beneficiary designations are current.	☐	☐	☐	☐
I have a current list of important personal papers, assets and liabilities.	☐	☐	☐	☐
My executor knows the location of my important papers and understands my estate plan.	☐	☐	☐	☐
My life insurance is adequate to meet the needs of my estate plan.	☐	☐	☐	☐
I know how life insurance can protect my estate from the effects of taxation.	☐	☐	☐	☐
I know the after-tax income my family will receive from my estate.	☐	☐	☐	☐
I know how taxes are applied to the beneficiaries of my retirement plans.	☐	☐	☐	☐
I would like assistance in organizing and reviewing my estate plan.	☐	☐	☐	☐

CHANGES ANTICIPATED IN THE NEXT YEAR

Please check all that apply.

- ☐ Realize a capital gain
- ☐ Buy or sell stocks
- ☐ Start or sell a business
- ☐ Purchase or sell a home
- ☐ Receive an inheritance
- ☐ Move to another location
- ☐ Change careers
- ☐ Buy or sell property

Other:

PRIORITIES FOR DISCUSSION

Please check: A: More than 3 years ago, B: 1-3 years ago, or C: Less than 1 year ago)

	A	B	C
My last financial and investment strategy review was:	☐	☐	☐
My last insurance protection review was:	☐	☐	☐
My last estate organization review was:	☐	☐	☐