Lifetime Financial Group

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.

Lifetime Financial Group
11207 W. Dodge Road, Ste 200
Omaha, NE 68154

402-934-7733
877-934-7733
www.lifetimefg.com

PERSONAL DATA:

Name: ______________________
Address: ______________________
City: __________ **State:** ______ **Zip:** ______
Home Phone: __________ **Cell:** __________
Occupation: ______________________
Age: ______ **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 even of my death, having any loans and mortgages paid off is:	○	○	○	○
The ability of my family to maintain their current standard of living upon me death is:	○	○	○	○
Protecting my estate from unnecessary taxation is:	○	○	○	○
Not outliving my retirement income is:	○	○	○	○
Having a financial professional who understand my financial objectives is:	○	○	○	○

INVESTMENT STRATEGY

(Please check the box that reflects 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 of sell a business
- ☐ Purchase or sell a home
- ☐ Other:
- ☐ Receive an inheritance
- ☐ Move to another location
- ☐ Change careers
- ☐ Buy or sell property

PRIORITES FOR DISCUSSION

(Please check ***A*** *- More than Three Years Ago,* ***B*** *- One to Three Years Ago,* ***C*** *- Less Than one 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:	○	○	○