

# Retire in **STYLE**

## What's your retirement STYLE?

Aligning your assets with your retirement goals starts with some simple questions.

### SAFETY

Are you satisfied with your asset diversification?	Yes	No
Do you have a mortgage or other debts to be paid in the event of death or disability?	Yes	No
Are you concerned about providing adequate income for your family in the event of death or disability?	Yes	No
Is there a long-term care plan in place for yourself, your spouse, and your parents?	Yes	No
Are you worried about unanticipated health costs?	Yes	No

### TAX-DEFERRED

Are you interested in reducing estate taxes your heirs may have to pay?	Yes	No
Are you currently making charitable gifts?	Yes	No
Are you concerned about accumulating retirement funds tax-deferred?	Yes	No
Would you benefit from reducing current taxation on a portion of your retirement income?	Yes	No

### YIELD

Are you concerned your Required Minimum Distributions (RMDs) will affect the growth of your portfolio?	Yes	No
Are you saving for a new or second home?	Yes	No
Are you saving for college tuition or expenses for a child or grandchild?	Yes	No
Are you saving money for a special project or purchase?	Yes	No
Are you concerned about keeping up with inflation?	Yes	No

### LIQUIDITY

Would you like a stable paycheck in retirement?	Yes	No
Are you concerned about running out of money during retirement?	Yes	No
Would you benefit from having a systematic program for savings and investments?	Yes	No
Are you concerned about accessing your assets in the case of an emergency?	Yes	No
Do you anticipate any large expenses in the next three years?	Yes	No

### ESTATE PLANNING BENEFITS

Is providing an efficient transfer of assets to your heirs important to you?	Yes	No
Are you managing an inheritance or potential inheritance?	Yes	No
Would you like to control the distribution of your assets after you're gone?	Yes	No

**Please check all that apply:**

- I have written financial goals.
- I have implemented a plan for achieving my goals.
- I have a current inventory of my major assets.
- It is important for me to have access to a team of financial professionals.
- I would like a comprehensive financial analysis.

**Please list any other concerns regarding your retirement savings or income strategies:**

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Review your answers with your Financial Advisor and together you can work toward retiring in STYLE.