Securian FINANCIAL®

Personal snapshot

Reviewing your financial strategy

Personal Snapshot

This overview is designed to help you quickly review your financial situation. Please take a few minutes to complete the following information.

Confidential information

Name Client 1 ________________________________ Date of Birth ______________

Name Client 2 ________________________________ Date of Birth ______________

Address ____

Phone (home) ______________ (work) ______________ (cell) ______________

Employer ____

Occupation ____

Email ____

Marital status ______________________ Years married ______________

Children's names and dates of birth ________________________________

Panoramic Snapshot

Please assign a value for each statement: **1 = Strongly agree** **2 = Agree** **3 = Disagree** **4 = Don't know or N/A**

_____ I use my financial resources well.

_____ I have clear goals for my financial future.

_____ Growing financially is important to me.

_____ I make all financial decisions with my spouse/partner.

_____ I have reviewed my will within the last three years.

_____ I understand and take advantage of all available tax-deferral strategies within my financial strategy.

_____ My spouse/partner understands our financial situation fully.

_____ I feel government taxes are just right.

_____ I take a systematic approach to saving money.

_____ I have adequate funds available for emergencies.

_____ I feel I am in control of my overall financial strategy.

_____ My financial goals are in writing.

_____ I need help reviewing my financial goals.

_____ I am in control of my budget.

_____ My life and disability insurance benefits are portable.

_____ My financial situation would not change if I became sick or hurt.

_____ At my death, all my debt would be eliminated.

_____ I am sure that my family's way of life is fully protected.

_____ My family would be unaffected financially at my death.

_____ I know that should my spouse/partner die today, there would be no financial hardship.

_____ I am confident in the insurance professional I work with today.

_____ I understand the purpose of insurance within my financial strategy.

_____ I need help reviewing my insurance protection.

_____ I know all I need to know in order to make good financial decisions.

_____ I know exactly what retirement income I will need when I retire.

_____ I know exactly how I am funding college education for my children/grandchildren.

_____ I am happy with the return on my current investments.

_____ Having a solid investment strategy is important to me.

_____ My investment portfolio reflects my risk personality perfectly.

_____ My investment strategy aligns perfectly with my financial goals.

_____ I need help in reviewing my investments.

_____ My financial goals are very clear to me.

_____ My financial professional's level of service is satisfactory.

_____ My retirement savings strategy is right on pace.

_____ I work with a great financial professional.

_____ I review my financial goals frequently.

_____ My current debt is structured in a way that makes sense to me.

_____ I feel the level of risk I take when investing is appropriate for me and my goals.

_____ I participate fully in retirement programs through work.

_____ I feel it is important to work with a financial professional.

_____ I would like help reviewing my asset allocation strategy.

Action Snapshot

Life events

Check all that apply:

- ☐ New job
- ☐ Newly married
- ☐ New child/Adoption
- ☐ New dependent
- ☐ New home
- ☐ Started a business
- ☐ Inheritance
- ☐ Recently retired
- ☐ Sold a business
- ☐ Divorce
- ☐ New debt
- ☐ Paid off debt
- ☐ New will
- ☐ School tuition has ended
- ☐ Approaching retirement

Close-up Snapshot

What concerns you the most?

Which areas are important to you as you think about your financial situation? Please check all that apply:

- ☐ Clarify personal and financial strategies and goals.
- ☐ Examine the financial impact of a death, including immediate cash needs and continuing income needs.
- ☐ Consider the financial impact of a disability on your income.
- ☐ Examine the impact that long-term care costs can have on your financial situation.
- ☐ Clarify protection needs.
- ☐ Education Expenses – Contemplate the cost of college expenses and strategies to fund that investment.
- ☐ Retirement Preparation – Consider how your current retirement strategies will meet your objectives.
- ☐ Investment Strategy – Examine your current asset allocation in relation to your risk personality.
- ☐ Tax Strategy – Contemplate your current level of taxation in relation to your financial strategies.

Securian Financial is the marketing name for Securian Financial Group, Inc., and its affiliates.

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