



FAMILY WEALTH PLANNERS
 PERSONAL TAX ADVISORS
www.finplans.net
 519-884-7087

Your Personal Financial Checkup (12/11)

	YES	NO
<input type="checkbox"/> Cash Management And Savings		
We need help organizing our personal finances.	_____	_____
We know what it costs us to live.	_____	_____
We have enough liquid cash for emergencies.	_____	_____
<input type="checkbox"/> Personal Income Taxes		
We are interested in ways to reduce taxes.	_____	_____
We need someone to prepare our tax returns.	_____	_____
We feel we are missing out on reducing taxes.	_____	_____
<input type="checkbox"/> Investments		
We are satisfied with our investment performance.	_____	_____
We know the annual return on our investments.	_____	_____
We get regular feedback from our advisor.	_____	_____
Our portfolio is properly diversified to prevent loss.	_____	_____
Fees are too expensive.	_____	_____
Fees are tax deductible.	_____	_____
<input type="checkbox"/> Insurance		
We don't know if we have sufficient insurance.		
Life	_____	_____
Disability, and health.	_____	_____
Our policy beneficiaries are correct.	_____	_____
<input type="checkbox"/> Major Family Needs		
We need assistance in planning for a major financial need. (Children's education, recreational property, purchase of home, Special needs child, etc.)	_____	_____
<input type="checkbox"/> Retirement		
We don't know if we have enough savings for retirement.	_____	_____
<input type="checkbox"/> Estate Planning		
Our wills were updated in the last five years.	_____	_____
We don't know if our wills minimize taxes and on death.	_____	_____
We are satisfied with the way our assets will be distributed.	_____	_____
We would like to stop the growth in our estate to save taxes.	_____	_____
We would like to start transferring assets to our children (gifts, family trusts etc.).	_____	_____
We have prepared " <i>financial</i> " and " <i>health</i> " powers of attorney.	_____	_____
<input type="checkbox"/> We rely on the following advisors		
Lawyer _____	_____	_____
Accountant _____	_____	_____
Bank _____	_____	_____
Investment advisor _____	_____	_____