

What's important to you?

Please check the three items that are the most important to you.

- Having enough income during retirement
- Purchasing a retirement property or secondary residence
- Providing for education of children or grandchildren
- Making sure that my family will be secure in the event of a catastrophe, i.e., death or disability of a breadwinner
- Restructuring or eliminating debt
- Passing my estate to my heirs smoothly without court battles
- Protecting my estate from estate taxes and transfer costs
- Providing a legacy and financial resources for successor generations
- Position myself to enjoy more of the things in life I value
- Providing capital for the charitable organizations that I support
- Avoiding capital gains or excessive taxes on the sale of business interests or investments
- Determine where and how to withdraw funds from investments to provide for my retirement income
- Reducing the income taxes that are generated from my investments
- Having a complete review of my investment portfolio to see what type of returns I have been getting and what type of risk I have been taking
- Having someone study my investment profile and make a recommendation on what type of portfolio I should have
- Protecting my assets from creditors and liability law suits
- Knowing where to put old and new investment funds to maximize tax efficiency and meeting my liquidity needs in the future



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