

Let's Talk

Ten things you may want to consider with your financial professional this year

- 1 Does my current mix of portfolio assets provide me with long-term growth potential as well as reliable cash flow?
 Yes No _____
- 2 Is my current retirement income approach designed to help keep up with inflation?
 Yes No _____
- 3 Are there additional protections that I can add to my portfolio to ensure I have cash flow each month, regardless of the ups and downs of the financial markets?

- 4 How will I plan for the increasing cost of health care?

- 5 How will I pay for an unexpected long term care need?

- 6 Are there financial products that will allow me to continue accumulating wealth while also providing protection in case of a long term care need? (if "Yes," list below)
 Yes No _____
- 7 How will my portfolio provide income to last my lifetime, no matter how long I live?

- 8 Do I have assets today that are positioned to provide me with dependable income when I need it? (if "Yes," list below)
 Yes No _____
- 9 How should I consider paying for essential expenses in retirement?

- 10 How should I consider paying for "nice-to-have" expenses in retirement?

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