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## FINANCIAL CHECKUP CHECKLIST

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Please take a few minutes to complete this checklist. Any “no” or “not sure” answers can point to potential problems that we may be able to help you resolve.

	Yes	No	Not Sure
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### Monthly Income and Expenses:

- |   |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|
| 1. Do you use a budget?   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Do you use financial software, such as Quicken?                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Do you have any financial problems that require immediate attention? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

### Retirement:

- |   |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|
| 1. Are you saving for retirement?   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Do you know what rate of return you need to maintain your lifestyle and keep ahead of inflation and taxes? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

### Children's Education:

- |   |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|
| 1. Have you planned for this expense?                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Is the ownership of your education savings designed to reduce taxes? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

### Your Investments:

- |  |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|
| 1. Are they well diversified?                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Are you satisfied with their performance? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

### Risk and Insurance:

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**323 N. Pacific Coast Hwy 101, Solana Beach, CA 92075**  
**Phone: (858) 481-7702 Fax: (858) 481-7828**

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1. Will your insurance cover your family's needs in the event of death or disability?
2. Do you have an umbrella liability policy?

**Estate Planning:**

1. Are your wills current?
2. Is your estate designed to minimize taxes and fees?

Additional Comments: \_\_\_\_\_

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