

Three Minute Financial Check-Up

Everybody has a plan, some are by design and some are by default. Designed plans have a predetermined cost while default plans have undetermined consequences.

Which type of plan do you have?

All of the following questions require an easy response of 'YES' or 'NO'. If you answer 'NO' to any of these questions, it is advisable to talk with a SDWMA advisor.

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|---|------------------------------|-----------------------------|
| 1. Do you have a current and comprehensive financial plan? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 2. Do you have an up-to-date will and estate plan in place? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 3. Do you know how much money you will need during retirement? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 4. If applicable, do you have a plan to help pay someone's college costs? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 5. Do you have adequate cash reserves for emergencies? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 6. Have you reviewed your life insurance coverages recently? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 7. Do you utilize a proven investment strategy you have confidence in? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 8. Do you have a 'go-to' financial advisor? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| 9. Have you considered the benefits of investment account consolidation? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

To speak with a SDWMA
advisor please contact us at
sdteam@schneiderdowns.com.

