

Concerns & Priorities Worksheet

Date: _____ Client Name(s): _____

Please rank each item below from 1 to 3 (1=most concerned about, and 3=least concerned about)

QUESTIONS:	RATING SCALE:		
	1	2	3
Running out of money in retirement - I want confidence that I can enjoy spending while ensuring my money lasts for life.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Market downturns - I want confidence my plan can withstand volatility and protect what I've built.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reliability of income in retirement - I want confidence that a portion of my assets are able to provide predictable income, regardless of market conditions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Long-term care and health challenges - I want a plan that protects my family from the emotional, physical, and financial burden of an extended care event.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When and how to withdraw money from my accounts in the most tax-efficient way - I want to maximize my income and minimize my taxes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When and how to optimize Social Security - I want to maximize benefits and avoid mistakes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Paying too much in taxes - I'd like to reduce my current and lifetime tax burden.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Income replacement for my spouse or beneficiaries - I want confidence my loved ones would be financially secure if something happened to me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Providing for my children, family, or charities - I want to make a meaningful impact during my lifetime and/or beyond.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Holistic planning and trusted advice - I want confidence that my investments, taxes, and estate are aligned and managed by one coordinated team of fiduciaries who understands my goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Simplicity, education, and organization - I want to feel confident and informed about my financial plan, knowing everything is connected, coordinated, and easy to understand.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Proactive guidance - I want advisors who stay ahead of industry trends and tax changes to deliver strategies that adapt to my evolving goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Aligning wealth with purpose - I want confidence my financial life reflects what matters most - my lifestyle, faith, and greater purpose.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Others:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Notes: