



War Chest:

What's Important About Money



Investment Assets

Qualified

Roth

Taxable



Debt:



Insurance

Life

Disability

LTC

P&C

Client Name:

Financial Blueprint

Client Name:

Date:

Goal:

Amount:

Date:

Feeling after accomplishing:

Goal:

Amount:

Date:

Feeling after accomplishing:

Goal:

Amount:

Date:

Feeling after accomplishing:

Notes

Personal

	Client (C)		Co-Client (Co)	
Name				
Date of Birth	<div>Gender</div>		<div>Gender</div>	
Employment Income	\$	or <input type="checkbox"/> Retired	\$	or <input type="checkbox"/> Retired
<div>Marital Status</div>		<div>State of Residence</div>		
<div>Living Expense</div>		<div>Current:</div>	\$	<div>Retirement:</div>
			\$	

Retirement Vision

How much do you need to retire comfortably?
How do you plan to ensure your retirement income lasts 25-40 years while mitigating inflation impact?
What is your distribution strategy?
What will you be doing in retirement that you are not able to do now?

Social Security Benefits

	Client		Co-Client	
Are you eligible?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Receiving Now	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Receiving Now
Amount of benefit	\$	<input type="checkbox"/> Use Program Estimate	\$	<input type="checkbox"/> Use Program Estimate
When to start	<input type="checkbox"/> at age		<input type="checkbox"/> at age	
What is your plan for optimizing your benefits?				
What is your strategy for Medicare in retirement?				

Retirement Income (pension, part-time work, rental property, annuities)

Income Type	Owner		Monthly Amount	Starts	Ends	COLA?	% Survivor
	C	Co					
	<input type="checkbox"/>	<input type="checkbox"/>	\$			<input type="checkbox"/>	%
	<input type="checkbox"/>	<input type="checkbox"/>	\$			<input type="checkbox"/>	%
What is your strategy to maximize your benefits?							

Assets (property, business, lump-sum pension, vehicles)

Description	Owner			Current Value	Planning to sell this asset?	Year Received/Sold	Cash Received (After-tax)
	C	Co	Joint				
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Yes <input type="checkbox"/> No		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Yes <input type="checkbox"/> No		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Yes <input type="checkbox"/> No		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Yes <input type="checkbox"/> No		

Investment Philosophy

What is your investment philosophy, and how did you develop it?
Do you know how much risk it is taking vs the return it is getting?
How often do you rebalance your accounts?
What is your strategy for an extended bear market?
What is your strategy for your tax allocation?

Estate

	Client	Co-Client	Notes
Will? Medical Directive? PoA?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Date documents were last reviewed			
What is your strategy if you don't wake up tomorrow?			
What is your strategy for leaving a legacy and what does that mean to you?			
Do you have any plans for charitable contributions or philanthropy?			

Risk Mitigation

How often do you review and update your insurance policies?
Do you have an emergency fund? How many months of expenses does it cover?
How do you plan on managing and reducing debt, including mortgages, credit cards, and other loans?
What is your long-term care strategy?

Risk Score

Client	Co-Client
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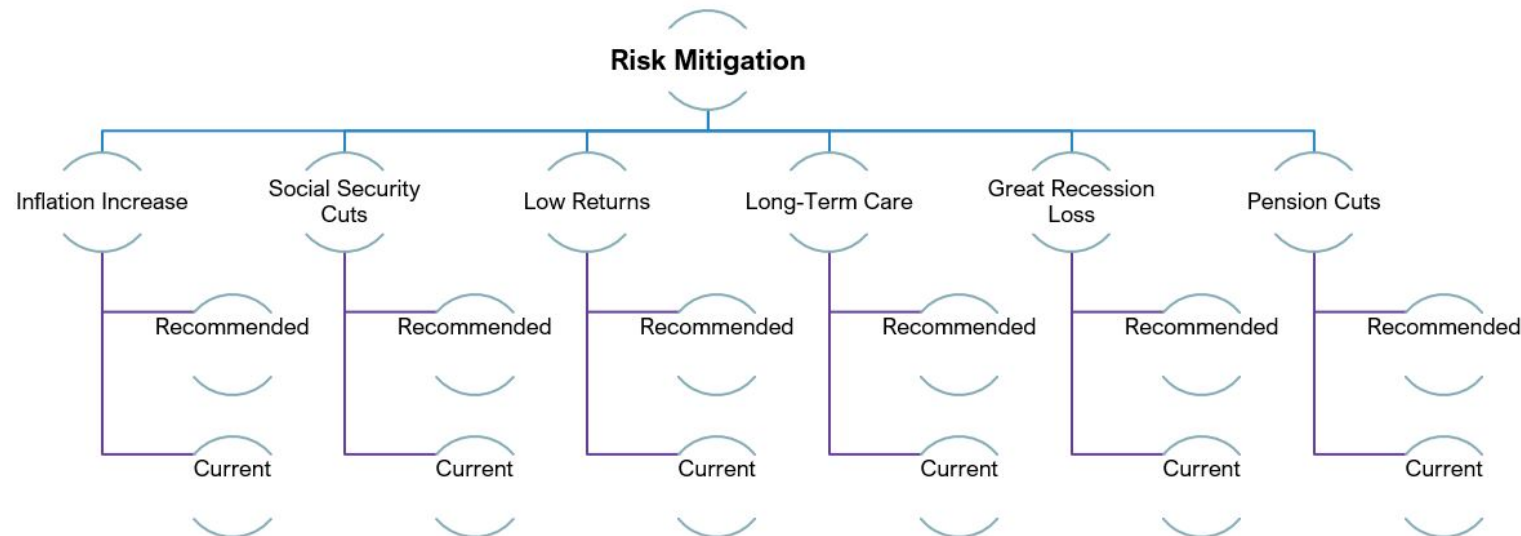
On a scale of 1 to 100, with 1 being the lowest risk and 100 being the highest risk, what's your risk score?

Notes

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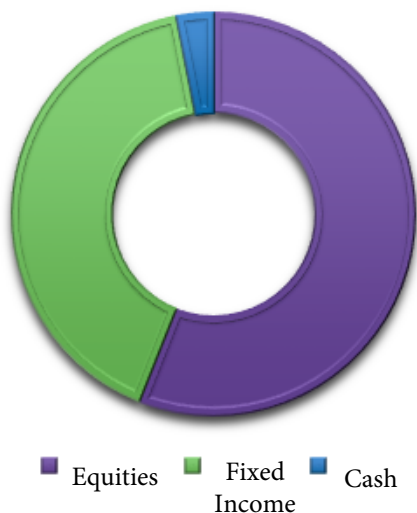
Risk Mitigation



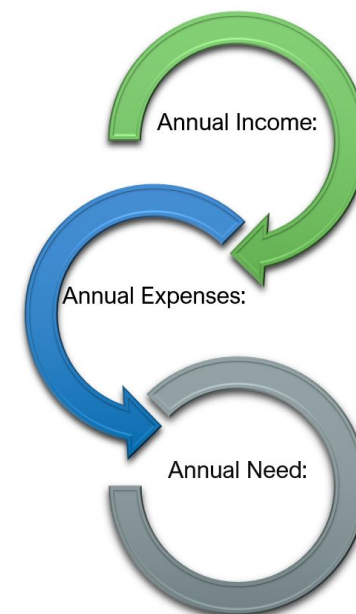
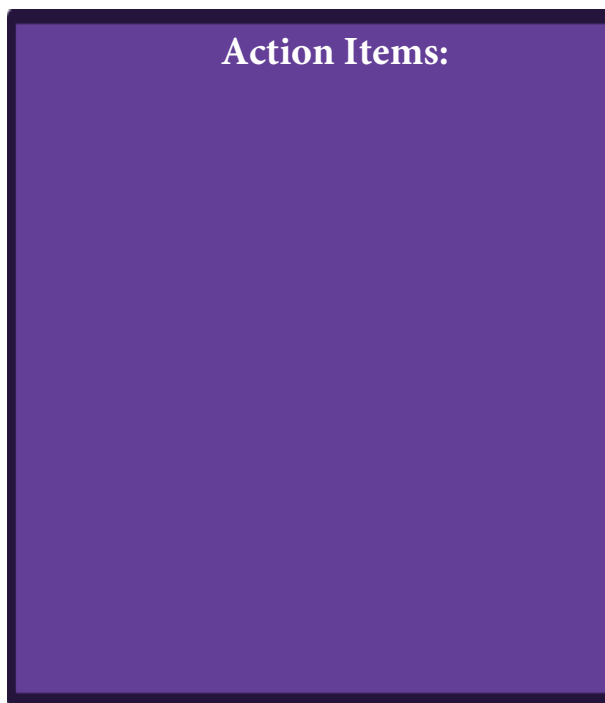
Recommended Scenario



Recommended Asset Allocation



Action Items:



Average Annual Withdrawal Rate:

To determine which investment(s) may be appropriate for you, consult with your financial professional prior to investing. The information provided is not intended to be a substitute for specific individualized tax planning or legal advice. Consult with a qualified tax or legal advisor. There is no assurance that the recommendations provided will yield positive outcomes. The purchase of certain securities may be required to affect some of the strategies. Investing involves risks including possible loss of principle.

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Accomplishments

Completed

N/A

	Reallocated accounts	
	Completed Budget	
	War Chest	
	Cash Reserve Bank Strategy	
	Paid off debt	
	Freeze Credit	
	Retired	
	Applied for SS Benefits	
	Applied for Medicare	
	Sold Business	
	Sold Home	
	Downsized/Moved to new home	
	Roth Conversions	
	Start RMDs	
	Consolidate Accounts	
	Opened/Contributing to 529	
	Funded Child's/Grandchild's education	
	Bought Life Insurance	
	Bought Disability Insurance	
	Bought LTC Insurance	
	Updated Home policy	
	Updated auto policy	
	Updated umbrella insurance	
	Created Last Will and Testament	
	Created Healthcare Proxy	
	Created POA	
	Created a Trust	
	Updated Beneficiaries	
	Gifting to Children	
	Gifting to Charity	