FINANCIAL FREEDOM[™] SCORECARD

We do not have a clear vision for our future.

We do not have clear life and financial goals.

We do not have a step-bystep action plan to achieve our goals.

Our investments are scattered, disorganized and poorly mixed.

We have not reviewed all of the tools which could help us achieve our vision.

> We do not have a plan to guard against losses from LTC, disability or premature death.

We do not have a transition plan in place for our estate.

We do not review our vision, plan or progress on a regular basis.

> Our financial advisors work in isolation from each other.

We do not have as much confidence in the future as we would like.

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We have a well-defined vision for our future.

We have clear life and financial goals.

We have a step-by-step action plan to achieve our goals.

Our investment portfolio is organized and properly diversified.

We have reviewed all the tools which could help us achieve our vision.

We have a plan to guard against losses from LTC, disability or premature death.

We have a well-defined plan in place for our estate.

We review our vision, plan and progress on a regular basis.

Our financial advisors work as a team to help us achieve our vision.

We have a strong sense of confidence about our future.

YOUR SCORE

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