



Growing and Protecting Your Net Worth

LIFE EVENTS AFFECT YOUR FINANCIAL PORTFOLIO

Client/Date:

Change is a natural part of life, and so are life events that can impact us personally and financially. Your financial management should always be *suitable for your current situation and goals*, and it should be updated whenever significant personal changes occur. Investment accounts, retirement plans, insurance policies, and estate planning may be affected.

Protecting your overall financial portfolio from loss is just as important as positioning it for growth. Even a perfectly managed investment portfolio can be rapidly depleted by the large expenses or loss of income that common life events can create -- unless life insurance, health insurance, and other asset protection strategies are in place.

Have any of the following events occurred recently, or do you anticipate them happening in the future?

Personal, Family, or Business Life Events

- Changes in personal or financial goals
- Births
- Deaths
- Marriage
- Divorce
- College Funding
- Home Bought or Sold
- Major Home Repairs or Redecorating
- Relocating
- Job Change
- Contribute to Organizations
- Inheritance or Settlements
- Law Suits, Liens, Creditor Actions; Bankruptcy
- Illness, Disability, or Long Term Care (for yourself or another family member)
- Buy, Sell, or Expand Business
- Illness, Disability, or Death of Business Partner, or Key Employee
- Addition of New Business Partner or Key Employee

Review Your Complete Financial Portfolio

Changes in the global economic, business, and financial environment may also require changes to your financial planning.

Call Me To Schedule Your Review!