Objectives			
Retirement / Investment Rate the importance of each item according to the following scale:	Low	Med	Hi
Your retirement goals			
Directing a portion of your personal savings or investment portfolio to a tax advantaged vehicle			
Having all of your portfolios consolidated and analyzed to make sure your overall plan is on track			
Matching your risk tolerance to that of your investment portfolio			
Reviewing your investment performance against that of an index			
Reviewing your investment performance against your plan			
Reviewing alternative retirement methods			
Minimizing the taxes on your investment accounts			
Reviewing techniques to save income tax and estate taxes on deferred money			
Asset protection in the result of serious illness			
Protecting assets in the event that you require long term care in the future			
Receiving adequate income in the event of disability during your working years			
Planning for income for your spouse in the event of your premature death			
Generating a guaranteed retirement income stream			
Planning for income for your children in the event of your premature death			

Estate

Rate the importance of each item according to the following scale:	Low	Med	High
Distributing assets equally to your children			
Protecting your assets transferred to your children from creditors, divorce, and bankruptcy			
Reviewing your insurance portfolio			
Reviewing different methods of meeting your estate tax liabilities			
Minimizing estate taxes			
Charitable planning to your estate's planning			
Contributing annually to a charity			
Gifting to your children if it doesn't interfere with your financial independence			
Planning for your grandchildren's education			
Reviewing the structure of your current will to eliminate unnecessary taxes			
Protecting your residence and/or vacation home from estate taxes			
Having your estate in trust for your spouse in order to protect your children's inheritance			

Objectives		-	
Business			
Rate the importance of each item according to the following scale:	Low	Med	High
Maintaining control of your business throughout your lifetime			
Eliminating the need to liquidate your business to pay estate taxes			
Passing your business in a manner where it is sold to key employees			
Creating a business planning concept to help you sell your business to key employees in an efficient manner			
Providing incentives to your key employees with non-stock compensation alternatives			
Having your key employees own stock in your company			
Protecting your business from the death of a key employee			
Protecting your key employees and their families from serious illness and disability			
Protecting your company from serious illness and disability of your employees			
Key employees to the continued success of your company			
Passing your business in a manner that maintains family ownership and control			
Maintaining family harmony after your estate has been settled			
Having your spouse take an active/ownership role in the business plan after you pass Creating a business planning concept that shows you how to gift/sell/bequest your business to			
your children/heirs			
Equalizing the inheritance for your children not active in the business			
Leaving the business only to active children/heirs versus all children/heirs			
Having your children/heirs active in the business with regards to the future success of your business			
Passing your business in a manner where it is sold to a third party			
Reviewing your business' property and casualty coverages every two years			
Reviewing alternative sources for your existing line of credit			
Reviewing the efficiency of your existing long term debt structure			
Buying out a partner's interest in the event of his or her death			
Client Defined			
Rate the importance of each item according to the following scale:	Low	Med	High