Your 60 Second Check-up

Times change. People change. Your financial plans need to also.

If you can answer "Yes" to any of these questions, call me to make sure your financial program still lines up with your needs. We can ease your mind about your family estate.

Since we last met…

1. Have you moved your residence?

2. Have you changed jobs or occupation?

3. **Has your spouse changed jobs?**

4. Have you changed your bank since we last met?

5. **Have you taken "Early Retirement" or expect to soon?**

6. Have you married, separated or divorced?

7. Have any of your children married, separated or divorced.

8. Has anyone close to you died?

9. **Do you have any pressing financial questions you need answered?**

10. Have you neglected to have Powers of Attorney prepared for you and your spouse?

11. **Have any of these other significant changes happened to you or your immediate family in the past year? (Births, Adoptions, Deaths, Graduations, New Job, Inheritance, Lottery Winning, Retirements, Name Change, Serious Illness or Injury, Health Challenges, Major Unforeseen Expenses, New Home, New Cottage, Vacation Home)**

12. Do you expect any of these changes in the year ahead?

13. **Was your last Will update more than five years ago?**

14. Have you been unable to organize your financial records?

15. **Do you want to change the beneficiaries on any of your insurance policies?**

16. Have you purchased any additional financial products since we last spoke?

17. Have you changed your thinking about the importance of your Financial Program?

18. Are you interested in a comprehensive review of your insurance policies or financial situation?

19. **Are you interested in learning how financial world changes since we last met affect you?**

20. Has our service been unsatisfactory?

Yes to any? Any Questions? Arrange your confidential review immediately at 416.273.4123 or 800.661.9572 or by email at: Werner@LifestyleNets.com

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