

Your goals are our top priority

Use the drop down menus for these goals exploration topics to rank order those that are priorities to you. There is space to include notes about your priorities on the following page. *Once complete, don't forget to save this document.*

 lifestyle spending PRIORITY	 dreams & major purchases PRIORITY	 education PRIORITY
 family protection PRIORITY	 business PRIORITY	 estate & legacy PRIORITY
 risk tolerance PRIORITY	 taxes PRIORITY	 retirement PRIORITY
 charitable & philanthropic PRIORITY	 health care PRIORITY	 provider care PRIORITY

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[1] Important disclosures provided on page 2.

lifestyle spending

dreams & major purchases

education

family protection

business

estate & legacy

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health care

provider care

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