



TONY GILBERT, CFP



FIVE KEY ISSUES TO CONSIDER

please complete prior to our visit

1. If you accumulate as many NET assets in the NEXT five years as you did in the LAST five years, are you going to be satisfied with your progress at this point?
 Yes No I don't know—show me more

2. Is the difference between what you OWN and what you OWE getting WIDER, NARROWER, or STAYING THE SAME?
 Wider Narrower Staying the Same I don't know—my financial advisor hasn't shown me lately

3. How many weeks of your typical month in retirement are FULLY funded by your current plans? (based on date of retirement until end of projected life expectancy)
 First week only Two weeks Three weeks All four weeks I don't know—help me find out

4. Does your current insurance program pay you immediately to stay home on the diagnosis of a critical illness, or would you have to go to work while critically ill?
 Pays me to stay at home I would still have to go to work
 I have no idea—please evaluate my situation with no obligation

5. How many of your children's further education is going to be fully funded, based on your current financial plan?
 1 Child 2 Children 3 children All of our children
 I have no idea—please conduct an investigation at no expense