Take your financial check-up now.

If your answer to any of the questions below is no, it's time to talk to your advisor.

TAX PLANNING

☐ yes ☐ no

Do you feel you use all available techniques to reduce your federal and state taxes?

INVESTMENT PLANNING

☐ yes ☐ no

Are you happy with your level of risk and returns this past year?

RETIREMENT PLANNING

☐ yes ☐ no

Have you had an analysis done to see if you can continue the same lifestyle you live today, at retirement?

INCOME PLANNING

☐ yes ☐ no

Do you feel comfortable that if you are disabled, all of your personal and business bills will be paid?

DEBT MANAGEMENT

☐ yes ☐ no

Do you have a debt management plan as to how to use debt to your advantage?

EDUCATION PLANNING

☐ yes ☐ no

Have you determined what you will need to invest to educate your children & grandchildren?

SPECIAL NEEDS

☐ yes ☐ no

Does anyone in your family have special needs (Alzheimer's, disabilities, Alcoholism, drug addiction, M.S.?

BUSINESS PLANNING

☐ yes ☐ no

Have you had your business appraised to determine current value?

ESTATE PLANNING

☐ yes ☐ no

Do you have a current properly drafted will, living will, and trust that protects your family members?

Earl Blackmon, CPA