

Financial Concerns Worksheet (Optional)

Retirement: Not concerned Somewhat Concerned Very concerned

1. At what age do you want to retire?
2. Will you have enough money to be able to retire when you factor in inflation and rising costs?
3. What kind of retirement do you envision having?

Pre-mature Death: Not concerned Somewhat Concerned Very concerned

1. Will your family be able to maintain the same standard of living?
2. Do you have a will or a trust in place?

Long Term Illness: Not concerned Somewhat Concerned Very concerned

1. How will you pay the bills? Do you have an emergency fund?

Disability: Not concerned Somewhat Concerned Very concerned

1. Who will take care of you or the people you take care of now?

Key employee or Stockholder Death: Not concerned Somewhat Concerned Very concerned

1. How will you fill the void (liquidation, consolidation, increased debt load)?

Financial Advisory Team: Not concerned Somewhat Concerned Very concerned

1. How happy are you with your accountant, attorney, insurance agent, realtor, etc.?

Macro-Economic/Political Direction: Not concerned Somewhat Concerned Very concerned

1. Inflation
2. Taxes
3. Future Income
4. Healthcare
5. Environment/Pollution
6. Public Morals

ToddMannFinancialServices.com | (541) 583-0093 | 1840 5th St. Springfield OR, 97477