



**CAPITAL
PRESERVATION**

Lifetime Income - Capital Preservation Checklist

Client name: _____

Phone _____ Email _____

Do you have any concerns about outliving your income or your assets? _____

Are you concerned about the low interest rates you are earning on your "safe money"? _____

Would you be interested in discussing alternatives for your safe money? _____

Would you be interested in learning about guaranteed lifetime income strategies? _____
