

# Discovery Questions



## Long term care/asset protection

- Do you have a plan in place to protect your assets in the event of a long term health care event?
- If you did need care, how would you pay for it?
- Would you spend down your assets? Which asset would you liquidate first?
- Would you like to discuss options on how best to protect your assets?

## Guaranteed lifetime income/Capital Preservation

- Do you have any concerns about outliving your income or your assets?
- Would you be interested in learning about guaranteed lifetime income strategies?
- Are you satisfied with the low interest rates you are earning on your “safe money”?
- Would you be interested in talking about alternatives for your safe money?
- Are you concerned about excessive market exposure with your current assets?



## Life Insurance check-up

- Would your family’s financial security be compromised if you were to die prematurely?
- Do you have living benefits life insurance?
- Would you like to learn about life insurance you don’t have to die to collect on?



## Legacy assets

- Do you have any accounts or assets you have specifically earmarked for your children?
- If I could show you how you can leave more money, income tax free and you still control the cash, would you be interested?

