

DISCOVERY QUESTIONS

LONG TERM CARE/ASSETS 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 to 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"?
- 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?