PARAMOUNT
WEALTH MANAGEMENT

# STRIVING TO MAXIMIZE YOUR FINANCIAL LIFE

## The 11 Step Checklist to Help Unlock Your Ideal Financial Future

# MAXIMIZING YOUR FINANCIAL LIFE CHECKLIST

1. I HAVE THE FUNDS TO NOT ONLY SUPPORT THE LIFESTYLE I DESIRE, BUT TO DO THINGS I NEVER THOUGHT POSSIBLE.

1 2 3 4 5 6 7 8 9 10

2. I AM HAPPY WITH MY ACCOMPLISHMENTS IN LIFE.

1 2 3 4 5 6 7 8 9 10

3. I FEEL CONFIDENT ABOUT MY CURRENT FINANCIAL SITUATION.

1 2 3 4 5 6 7 8 9 10

4. I FEEL CONFIDENT ABOUT MY FINANCIAL FUTURE.

1 2 3 4 5 6 7 8 9 10

5. I AM LIVING MY LIFE WITH PURPOSE.

1 2 3 4 5 6 7 8 9 10

6. MY RELATIONSHIPS HAVE NOT BEEN ADVERSELY AFFECTED BY MONEY.

1 2 3 4 5 6 7 8 9 10

7. I CAN AFFORD TO TAKE CARE OF AND GIVE TO THE PEOPLE I WANT TO HELP.

1 2 3 4 5 6 7 8 9 10

8. I HAVE BEEN ABLE TO MAINTAIN MY HEALTH WITHOUT FINANCIAL STRESS AND FEEL CONFIDENT ABOUT THE FUTURE IN THIS REGARD AS WELL.

1 2 3 4 5 6 7 8 9 10

9. I AM TAKING THE TIME TO DO THE THINGS I MOST ENJOY AND SPEND TIME WITH THE PEOPLE I MOST ENJOY.

1 2 3 4 5 6 7 8 9 10

10. I GET GREAT SATISFACTION AND MEANING FROM THE WORK I DO.

1 2 3 4 5 6 7 8 9 10

**OVERALL SCORE:** ______________

# RESULTS

## 0-40

IT MAY BE ADVISABLE TO REEVALUATE YOUR PERSONAL FINANCES TO GIVE YOU GREATER CLARITY REGARDING YOUR FINANCIAL FUTURE. PLEASE CONTACT OUR OFFICES TO REQUEST A COMPLIMENTARY CONSULTATION OR EVALUATION.

## 41-60

THERE MAY BE SOME DANGERS LURKING IN YOUR FINANCIAL SITUATION. IT MAY BE WISE TO SEEK PROFESSIONAL GUIDANCE TO HELP PROVIDE INSIGHT WHEN PLANNING FOR YOUR FUTURE. PLEASE CONTACT OUR OFFICE TODAY TO DISCUSS HOW PARAMOUNT WEALTH MANAGEMENT CAN HELP YOU.

## 61-80

CONGRATULATIONS! WE BELIEVE YOU HAVE A SOLID FINANCIAL FOUNDATION. HOWEVER, THERE IS ROOM FOR IMPROVEMENT TO GAIN ADDITIONAL CLARITY ON YOUR FINANCIAL GOALS. IF YOU WOULD LIKE TO HAVE A DEEPER UNDERSTANDING OF YOUR FINANCES, WE ENCOURAGE YOU TO CONTACT OUR OFFICES SO THAT WE CAN HELP YOU ON YOUR PATH TO FINANCIAL FREEDOM.

## 81-100

WE BELIEVE YOU HAVE A VERY CLEAR UNDERSTANDING OF YOUR FINANCES AND YOUR PERSONAL FINANCIAL PLAN. IF YOU WOULD LIKE A SECOND OPINION ON YOUR EXISTING FINANCIAL PLAN, PLEASE CONTACT OUR OFFICES TO SCHEDULE A NO OBLIGATION REVIEW.

Did your results surprise you? Why or Why not?

Have you had the conversation about Maximizing Your Financial Life with your current financial advisor? Y/N

If not, are you confident that your advisor is making your money work **for** you and helping you reach your goals?

What support or help do you need to follow through on making your return on life even better?

# RETIREMENT READINESS - KNOW WHAT YOU'RE RETIRING TO!

Answer the following questions to prepare yourself for what you want out of life in retirement

Circle the top 5 things that are most important to you in retirement from the list below.

1. **TRAVEL**
2. **RELAXATION**
3. **CONTINUED LEARNING**
4. **DEVELOP NEW HOBBIES/LEARN A NEW SKILL**
5. **HOME PROJECTS**
6. **START A NEW BUSINESS/CAREER**
7. **SPEND MORE TIME WITH THE PEOPLE I VALUE MOST**
8. **GIVE MORE BACK IN THE FORM OF COMMUNITY INVOLVEMENT**
9. **FOCUS ON HEALTH**
10. **CHECK THINGS OFF MY BUCKET LIST - IE. DO SOMETHING I NEVER THOUGHT POSSIBLE**
11. **PLAY!**
12. **GET A PART TIME JOB DOING SOMETHING I ENJOY**

Based on your answers above, have you "tested" out what retirement looks like for you?
If travel is important, have you traveled recently to know if you enjoy the air/hotel time?
If you want to take up a new hobby have you been trying new things by going to classes or stepping out of your box to see what you most enjoy?

Have you talked to your financial advisor about what retirement looks like to you? Has your financial plan been tested to ensure you can accomplish your goals?

Have you talked with your spouse or close supportive family about what your ideal retirement looks like? Note: It is imperative to get those closest to you involved so that they can help you live a happy, healthy, productive retirement!

# WE HOPE THAT THIS CHECKLIST HAS SERVED AS A VALUABLE TOOL WHEN EVALUATING YOUR FINANCES AND YOUR EXISTING FINANCIAL ADVISOR.

If you would like more information, additional resources, or would like to schedule an in person meeting please contact us today!

**www. paramountwealth.com**
**Gretchen@ParamountWealth.com**
Phone: (517) 787-4444
420 South Brown Street, Jackson, MI 49203