

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.										
THEVER THOUSE	1	2	. 3	4	5	6	7	8	9	10
2. I AM HAPPY W	/ITH N	MY ACC	COMPL	.ISHM	ENTS	IN LI	FE.			
	1	2	3	4	5	6	7	8	9	10
3. I FEEL CONFID	ENT A	ABOUT	MY CI	JRREN	IT FIN	ANCI	AL SI	TUAT	ION.	
	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 M	IY LIFI	E WITH	I PURF	OSE.						
	1	2	3	4	5	6	7	8	9	10
6. MY RELATION	SHIPS	HAVE	NOT	BEEN A	ADVE	RSELY	/ AFFI	ECTEI	BY I	MONEY.
	1	2	3	4	5	6	7	8	9	10
7. I CAN AFFORD	T0 T	AKE C	ARE OF	AND	GIVE	TO TI	HE PE	OPLE	I WA	NT TO HELP.
	1	2	3	4	5	6	7	8	9	10
8. I HAVE BEEN A									ANCI	AL STRESS AND FEEL
	1	2	3	4	5	6	7	8	9	10
9. I AM TAKING T PEOPLE I MOST I			DO T	НЕ ТН	INGS	I MOS	ST EN	JOY A	AND S	PEND TIME WITH THE
	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: _____





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.



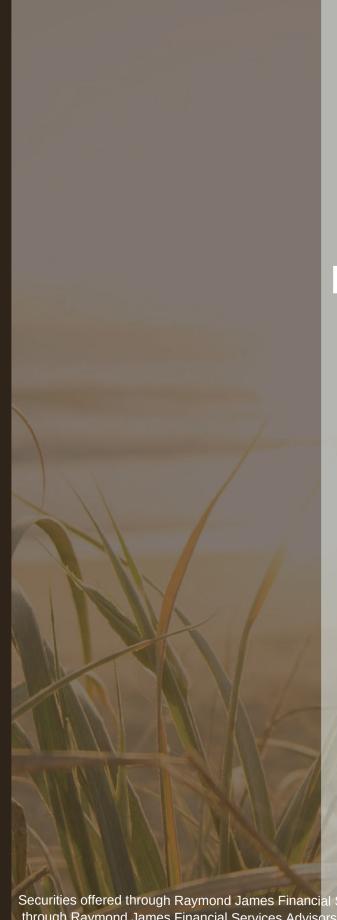
Did your results surprise you? Why or Why not?	
Did your results surprise you: Why or Why hot:	
Have you had the conversation about Maximizing Your Financial Life with your current financial advisor? Y/N	
If not, are you confident that your advisor is making your money work for you and helping you reach 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 you 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!

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