ARBUCKLE Personal Wealth Strategies

FAMILY WEALTH PLANNERS
PERSONAL TAX ADVISORS
www.personalwealthstrategies.net
519-884-7087

Your Personal Financial Checkup

	YES	NO
❑ **Cash Management And Savings**		
Our personal finances are properly organized.	____	____
We know what it costs us to live.	____	____
We have enough liquid cash for emergencies.	____	____
❑ **Personal Income Taxes**		
We are unsure if our tax returns are properly prepared.	____	____
We feel we are missing out on reducing income taxes.	____	____
❑ **Investments (Important)**		
We are satisfied with our investment performance.	____	____
We know the annual return on our investments.	____	____
We get regular feedback from our advisor.	____	____
Our portfolio is properly diversified.	____	____
We believe that our fees are reasonable.	____	____
Our investment fees are tax deductible.	____	____
❑ **Insurance**		
We don't know if we have sufficient insurance.		
Life	____	____
Disability, and health.	____	____
Our policy beneficiaries are the right people at the right age.	____	____
❑ **Major Family Needs**		
We need assistance in planning for a major financial need. (Children's education, recreational property, purchase of home)	____	____
❑ **Retirement**		
We don't know if we have enough savings for retirement.	____	____
❑ **Estate Planning**		
Our wills were updated in the last five years.	____	____
We don't know if our wills minimize taxes and on death.	____	____
We are satisfied with the way our assets will be distributed.	____	____
We would like to stop the growth in our estate to save taxes.	____	____
We would like to start transferring assets to our children now (gifts, family trusts etc.).	____	____
We have prepared "*financial*" and "*health*" powers of attorney.	____	____
❑ **We rely on the following advisors**		
Accountant ______________________________	____	____
Bank ______________________________	____	____
Financial Planner ______________________________	____	____
Insurance Advisor ______________________________	____	____
Investment Advisor ______________________________	____	____
Lawyer ______________________________	____	____