

My Financial Priorities

Providing for my spouse in the event of death	High	Medium	Low	N/A
Providing for Long-Term Care (in current residence or away from home)	High	Medium	Low	N/A
Avoiding Probate	High	Medium	Low	N/A
Leaving a legacy to my heirs	High	Medium	Low	N/A
Leaving a legacy to charity	High	Medium	Low	N/A
HAVING income for as long as I live	High	Medium	Low	N/A
Safeguarding my funds against market loss	High	Medium	Low	N/A
Reducing unnecessary taxes	High	Medium	Low	N/A
Earning a competitive rate of return	High	Medium	Low	N/A
Other:				
_____	High	Medium	Low	N/A
_____	High	Medium	Low	N/A
_____	High	Medium	Low	N/A

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