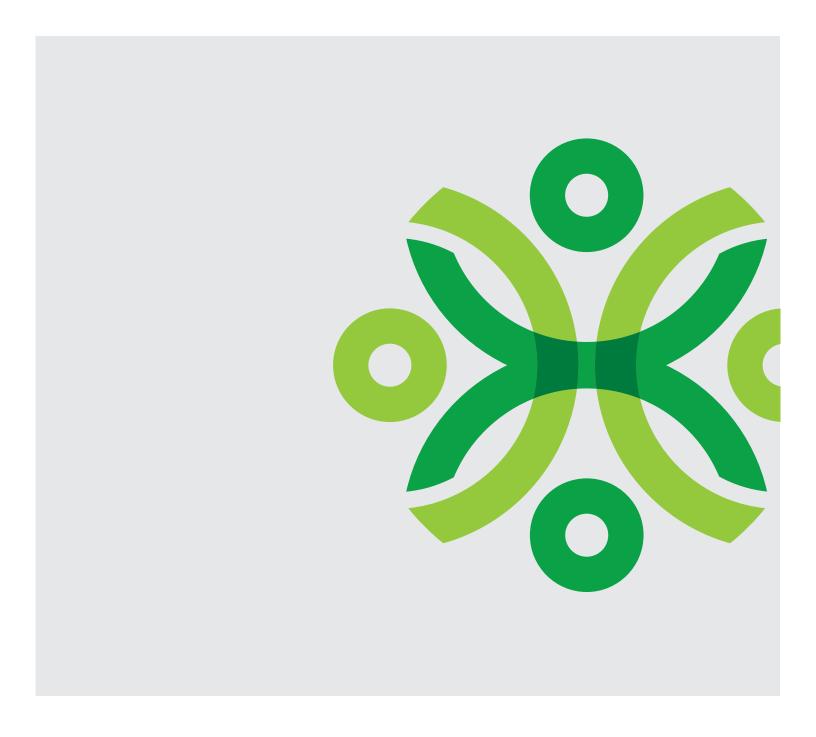
Personal snapshot



Reviewing your financial strategy



Personal Snapshot

This overview is designed to help you quickly review your financial situation. Please take a few minutes to complete the following information.

Confidential information

Name Client 1		Date of Birth
Name Client 2		Date of Birth
Address		
Phone (home)	(work)	(cell)
Employer		
Occupation		
Email		
Marital status		
Children's names and dates of birth		

Panoramic Snapshot

Please assign a value for each statement:	1 = Strongly agree	2 = Agree	3 = Disagree	4 = Don't know or N/A		
I use my financial resources well.		My life and disability insurance benefits are portable.				
	Growing financially is important to me		My financial situation would not change if I became sick or hurt.			
I make all financial decisions with my spouse/partner.	_	_ At my death, all my debt would be eliminated.				
I have reviewed my will within the last three years. — I understand and take advantage of all available tax-deferral strategies within my financial strategy. —		 I am sure that my family's way of life is fully protected. My family would be unaffected financially at my death. 				
					My spouse/partner understands our find situation fully.	 My spouse/partner understands our financial situation fully. I feel government taxes are just right.
I feel government taxes are just right.						
I take a systematic approach to saving money.		I am confident in the insurance professional I work with today.				
I have adequate funds available for emergencies.		I understand the purpose of insurance within my				
I feel I am in control of my overall fina	ncial strategy.	financial s	financial strategy.			
My financial goals are in writing.		I need help	o reviewing my i	nsurance protection.		
I need help reviewing my financial goals.		I know all financial c		in order to make good		
		I know exc when I ret		ement income I will need		

I know exactly how I am funding college education	My retirement savings strategy is right on pace.			
for my children/grandchildren.	I work with a great financial professional.			
I am happy with the return on my current investments.	I review my financial goals frequently.			
—— Having a solid investment strategy is important to me.	My current debt is structured in a way that makes sense to me.			
My investment portfolio reflects my risk personality perfectly.	I feel the level of risk I take when investing is appropriate for me and my goals.			
My investment strategy aligns perfectly with my financial goals.	I participate fully in retirement programs through work.			
I need help in reviewing my investments.	I feel it is important to work with a financial professional.			
My financial goals are very clear to me.	I would like help reviewing my asset			
My financial professional's level of service is satisfactory.	allocation strategy.			

Action Snapshot

Life events

Check all that apply:

New job	New home	Sold a business	New will
Newly married	Started a business	Divorce	School tuition has ended
New child/Adoption	Inheritance	New debt	Approaching retirement
New dependent	Recently retired	Paid off debt	

Close-up Snapshot

What concerns you the most?

Which areas are important to you as you think about your financial situation? Please check all that apply:

Clarify personal and financial strategies and goals.

Examine the financial impact of a death, including immediate cash needs and continuing income needs.

Consider the financial impact of a disability on your income.

Examine the impact that long-term care costs can have on your financial situation.

Clarify protection needs.

Education Expenses - Contemplate the cost of college expenses and strategies to fund that investment.

Retirement Preparation – Consider how your current retirement strategies will meet your objectives.

Investment Strategy - Examine your current asset allocation in relation to your risk personality.

Tax Strategy – Contemplate your current level of taxation in relation to your financial strategies.

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