



# QUESTIONNAIRE



## VOSBERG WEALTH MANAGEMENT

Our process is designed to help our clients achieve simplicity and confidence during their retirement years. It's focused around 5 key areas of your current financial life. It would be most beneficial if you completed this brief questionnaire prior to your initial consultation with Vosberg Wealth Management.

Full Name: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_

PLEASE CHECK THE BOX INDICATING YOUR LEVEL OF CONCERN IN THE FOLLOWING KEY AREAS:

INCOME PLANNING	Very Concerned	Somewhat Concerned	Not Concerned
Having enough income to last the rest of your life			
Having your retirement income be guaranteed			
Making sure your spouse has enough income in the event of your death			
Having a plan to help guard against inflation impacting your buying			
Having a plan to maximize the amount I'm getting from Social Security			

INVESTMENT PLANNING	Very Concerned	Somewhat Concerned	Not Concerned
The potential impact of market volatility on your retirement portfolio			
Adjusting your portfolio to reduce fees			
Finding out if I'm paying "hidden" fees within my investment accounts			
Assessing my risk tolerance			
Evaluating ways to reduce risk while still accomplishing my goals			

TAX PLANNING	Very Concerned	Somewhat Concerned	Not Concerned
Assessing the taxable nature of your current holdings			
Strategizing ways to include tax-deferred or tax free income in your retirement plan			
Planning which assets to draw income from first to reduce tax burden			
Leveraging qualified money to maximize tax-free dollars to your beneficiaries			

HEALTH CARE PLANNING	Very Concerned	Somewhat Concerned	Not Concerned
Having a plan to pay for the expected & rising health-care costs in retirement			
Learning more about all aspects of Medicare			
Analyzing options for Long-Term Care			

LEGACY PLANNING	Very Concerned	Somewhat Concerned	Not Concerned
Maximizing your estate and income tax planning opportunities			
Utilizing life insurance to provide a tax free legacy to beneficiaries			
Protecting IRA/qualified accounts from becoming fully taxable to beneficiaries upon your death			