

MY PERSONAL OBJECTIVE TODAY (month ____ year ____) IS TO:

	HIGH	MODERATE	LOW
Increase current income	_____	_____	_____
Defer current income	_____	_____	_____
Reduce income tax	_____	_____	_____
Conserve estate for heirs	_____	_____	_____
Diversify investment assets	_____	_____	_____
Develop a business succession plan	_____	_____	_____
Review adequacy of insurance	_____	_____	_____
Maximize company benefits	_____	_____	_____
Education of child/grandchild	_____	_____	_____
Reduce Federal Estate Tax	_____	_____	_____
Professional investment mgmt For Heirs	_____ _____	_____ _____	_____ _____
Transfer wealth during lifetime Lump sum	_____	_____	_____
To heirs	_____	_____	_____
To charity	_____	_____	_____
Income only	_____	_____	_____
To heirs	_____	_____	_____
To charity	_____	_____	_____
Faster investment growth	_____	_____	_____
Convert unproductive assets	_____	_____	_____
Shift tax dollars ONLY to charity	_____	_____	_____
Gift to charity through will or trust	_____	_____	_____
Choose an Executor	_____	_____	_____
Choose successor Trustees	_____	_____	_____