

Financial Objectives

Please Rate the Importance of the following:

Low - High

Your retirement goals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Having all of your portfolios consolidated and analyzed to make sure your overall plan is on track	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Directing a portion of your personal savings or investment portfolio to a tax advantaged vehicle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Matching your risk tolerance to that of your investment portfolio	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reviewing your investment performance against that of an index	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reviewing your investment performance against your plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Minimizing the taxes on your investment accounts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reviewing techniques to save income tax and estate taxes on deferred money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Asset protection in the result of serious illness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Protecting assets in the event that you require long term care in the future	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Receiving adequate income in the event of a disability in your working years	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Planning for income for your spouse in the event of your premature death	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Generating a guaranteed retirement income stream	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Planning income for your children in the event of your premature death	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Kautz Financial

Independent Wealth Management

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