

Financial Education

Remember, this is YOUR PERSONALIZED Blueprint. You will have to understand what you are doing and why. Our goal is to help educate you so you can make informed decisions about your life and money. To help you best, we need to know what level of investment knowledge you have so we can communicate effectively to you.

Below are some terms that we may use. In order to make sure we are on the same page, please rate your familiarity/comfort level with the following topics (**1= no knowledge; 5= in-depth knowledge**). Additionally, if there is ever anything about which you'd like clarification or more information, just let us know.

Client A						Client B					
Stocks/Bonds/Mutual Funds	1	2	3	4	5	Stocks/Bonds/Mutual Funds	1	2	3	4	5
Home/Auto Insurance	1	2	3	4	5	Home/Auto Insurance	1	2	3	4	5
Umbrella Policy	1	2	3	4	5	Umbrella Policy	1	2	3	4	5
Life Insurance	1	2	3	4	5	Life Insurance	1	2	3	4	5
Disability Insurance	1	2	3	4	5	Disability Insurance	1	2	3	4	5
Long Term Care Insurance	1	2	3	4	5	Long Term Care Insurance	1	2	3	4	5
Mortgage(s)	1	2	3	4	5	Mortgage(s)	1	2	3	4	5
Home Equity	1	2	3	4	5	Home Equity	1	2	3	4	5
Annuities	1	2	3	4	5	Annuities	1	2	3	4	5
S & P 500/DOW Jones/NASDAQ	1	2	3	4	5	S & P 500/DOW Jones/NASDAQ	1	2	3	4	5
Retirement Accounts (Qualified)	1	2	3	4	5	Retirement Accounts (Qualified)	1	2	3	4	5
How Money Grows	1	2	3	4	5	How Money Grows	1	2	3	4	5
4 Taxing Environments	1	2	3	4	5	4 Taxing Environments	1	2	3	4	5
Asset Allocation	1	2	3	4	5	Asset Allocation	1	2	3	4	5
Life Settlements	1	2	3	4	5	Life Settlements	1	2	3	4	5
Estate Tax	1	2	3	4	5	Estate Tax	1	2	3	4	5
Family Foundation	1	2	3	4	5	Family Foundation	1	2	3	4	5
Wills	1	2	3	4	5	Wills	1	2	3	4	5
Health Insurance	1	2	3	4	5	Health Insurance	1	2	3	4	5
Trusts	1	2	3	4	5	Trusts	1	2	3	4	5
Pension Trap	1	2	3	4	5	Pension Trap	1	2	3	4	5
Power of Attorney	1	2	3	4	5	Power of Attorney	1	2	3	4	5