



# **Annual Review Questionnaire**

Updated March 2026

To help us make the most of our upcoming review, please take a few minutes to answer the questions below.

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## 1. Personal Updates

Since our last meeting, have there been any major life changes?

- Marriage or divorce
  - Birth or adoption of a child
  - New grandchildren
  - Health changes
  - New job or career change
  - Retirement plans changed
  - Home purchase or sale
  - Other: \_\_\_\_\_
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## 2. Financial Changes

Have any of the following changed?

- Income increased or decreased
  - New debts or loans
  - Significant increase in savings or investments
  - New employer retirement plan available
  - Large upcoming expense
  - Inheritance or financial gift received
  - Other: \_\_\_\_\_
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## 3. Retirement Planning

Have your retirement goals changed?

- Expected retirement age changed
- Desired retirement lifestyle changed
- Planning to work longer or retire earlier
- No changes

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#### **4. Protection Planning**

Please indicate if any of these have changed.

- Life insurance coverage
  - Disability insurance coverage
  - Long-term care planning
  - Emergency savings
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#### **5. Estate Planning**

Do you currently have the following?

- Will
- Living Trust
- Healthcare Power of Attorney
- Financial Power of Attorney
- Not sure

Have any beneficiaries changed?

Yes  No

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#### **6. Top Priorities**

What financial topics would you most like to discuss during our review?

- Retirement planning
  - Investment review
  - Tax strategies
  - Estate planning
  - Insurance protection
  - Education planning
  - Other: \_\_\_\_\_
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## **7. Final Question**

What financial question or concern is most important for us to discuss during our meeting?

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