

The Beyond Wealth Care Process

A Financial Roadmap for your Lifetime and Beyond



Wealth Management Score Card

I do not have clear financial goals	1	2	3	4	5	I have clear well defined financial goals
I do not have a strategy to achieve my personal and financial goals	1	2	3	4	5	I have a strategy to achieve my personal and financial goals
I do not have a step-by-step action plan to achieve my goals, both personal and financial	1	2	3	4	5	I have a step-by-step action plan to achieve my goals, both personal and financial
My investments are scattered and disorganized	1	2	3	4	5	My investment portfolio is integrated and organized
I have not reviewed all of the tools which could help me achieve my vision	1	2	3	4	5	I have reviewed all of the tools which could help me achieve my vision
I put off important decisions and am not aware of my dangers and opportunities	1	2	3	4	5	I make proactive decisions, protect myself from dangers and take advantage of my opportunities
I do not review my vision and plan, or chart my progress on a regular basis	1	2	3	4	5	I do review my vision and plan or chart my progress on a regular basis
My advisors work in isolation from each other	1	2	3	4	5	My advisors work as a team to help me achieve my vision
I do not have a plan to pass my wealth that reflects my values and takes care of those dependant on me	1	2	3	4	5	I have a plan to pass my wealth that reflects my values and provides those dependant on me
I struggle with the balance of maintaining my lifestyle & saving for goals like college and retirement	1	2	3	4	5	I know exactly what to save for all of my goals
I do not have as much confidence in the future as I would like	1	2	3	4	5	I have a strong sense of confidence about my future
I do not know how to create a retirement income from my investments	1	2	3	4	5	I have a plan to create reliable & growing income stream in retirement