

# The Beyond Wealth Care Process

## A Financial Roadmap for your Lifetime and Beyond



### Wealth Management Score Card

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