

# Destiny Financial Group

## My Personal Financial/Retirement/Tax Review

Date: \_\_\_\_\_

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_

Spouse: \_\_\_\_\_ Birthdate: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_ Cell/Work Phone: \_\_\_\_\_

Spouse Cell/Work Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

Occupation: \_\_\_\_\_ Spouse: \_\_\_\_\_

| <b>I want my Personal Financial/Retirement/Tax Review for these Questions:</b> |  | <b>Yes</b>               | <b>No</b>              |
|--|--|--------------------------|------------------------|
| How much of my Retirement money is Taxable, Tax-Deferred, or Tax-Free?         |  |                          |                        |
| What is my Tax Bracket and How do I lower my Taxes?                            |  |                          |                        |
| How do I Avoid paying up to 70% Tax in my Retirement Accounts?                 |  |                          |                        |
| How do I Avoid 50% Tax Penalty in my RMD?                                      |  |                          |                        |
| What is my Asset Allocation and How much is at Risk?                           |  |                          |                        |
| How do I have Safe Buckets of Investments?                                     |  |                          |                        |
| I want more information on Wills, Power of Attorney and Medical Directives.    |  |                          |                        |
| I want to know if a Living Trust or Irrevocable Trust is good for me.          |  |                          |                        |
| I want more information on Stretch IRA.  |  |                          |                        |
| How do I double my Money, (If I Qualify)?                                      |  |                          |                        |
| I want more information on Social Security Income and Taxes.                   |  |                          |                        |
| <b>Other Questions?</b>  |  |                          |                        |
| <b>I want my Personal Financial/Retirement/Tax Review:</b>                     |  |                          |                        |
| <b>Days</b>  | <b>Hours</b>   |                          |                        |
| <input type="checkbox"/> Monday <input type="checkbox"/> Thursday              | <input type="checkbox"/> 9am-11am <input type="checkbox"/> 4pm-6pm | <input type="checkbox"/> | <b>AS</b><br><b>AP</b> |
| <input type="checkbox"/> Tuesday <input type="checkbox"/> Friday               | <input type="checkbox"/> 12pm-2pm                                  |                          |                        |
| <input type="checkbox"/> Wednesday   | <input type="checkbox"/> 2pm-4pm                                   |                          |                        |

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