

Establishing your Retirement Priorities

Rank the following in terms of their importance. The higher the rating, the more important the issue is to you and your spouse/partner.

Retirement Income Priority	Rating 1-10	
	You	Spouse/Partner
Income Security Being certain you will not outlive your income		
Safety of Capital Being certain your income producing assets are protected		
Guaranteed Income Having a base level of guaranteed income that you cannot outlive		
Highest Possible Income Today Use all assets to create the largest income immediately		
Using Capital Assets Willing to reduce the value of your assets to create your income		
Addressing Inflation Having your income grow to maintain purchasing power		
Reducing Taxes Explore strategies to pay less tax on your income		
Health Risk Management Minimizing the use of your personal assets for health care costs		
Estate/Wealth Transfer Leaving assets to family and favourite causes rather than the tax department		

Please select the top two or three priorities from the list above.

Please select the two least important priorities from the list above.

Advisor notes, comments and recommendations