

Financial *Life* Planning



Life Transitions Profile

Name: _____

Date: _____

We enter into life transitions as a result of planned or unplanned events or changes that continue to happen in our lives. All life transitions have an affect on our finances in some way. By exploring each life transition that we experience, we are better equipped to navigate successfully through them.

Personal / Family

- Getting married
- Going through a divorce or separation
- Recent loss of your spouse (widowhood)
- Expecting a child
- Adopting a child
- Need to hire child care
- Child entering adolescence
- Child with special needs (disability / other)
- Child preparing for college
- Child going away to college
- Child getting married
- Empty nest
- Family special event
- Providing assistance to a family member
- Concerned about an aging parent
- Concerned about the health of spouse or child
- Concerned about personal health
- Family member in need of professional care
- Family member with a disability or serious illness
- Family member expected to die soon
- Recent death of family member
- Recent birth of a child
- Family member diagnosed with cancer
- Entering single parenthood
- Family member with special needs

Priority Level

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Work / Career

- Contemplating Career Change
- New Job
- Job promotion
- Job loss
- Job restructuring
- New job training / education program
- Starting a new business
- Gaining or losing a business partner
- Selling or closing a business
- Transferring business to family member
- Downshift / Simplify work life
- Taking a sabbatical or leave of absence
- Phasing into retirement
- Full retirement from current job / career
- Buying an existing business
- Expanding an existing business

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Financial / Investment

Selling a house	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Refinancing your mortgage	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Purchase a home	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Relocating	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Re-considering investment philosophy and risk profile	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Significant investment gain	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Significant investment loss	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Concerned about debt	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Considering an investment opportunity	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Receiving an inheritance or financial windfall	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Selling assets	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Considering change of financial service provider	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA

Community / Charitable

Give to other charitable organizations	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Monthly stipend to parent(s) (parental pension)	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Gifts to children / grandchildren	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Develop or review an estate plan	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Develop an end of life plan	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Creating or funding a foundation	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Creating or funding a scholarship fund	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Give to community causes / events	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA
Give to church or religious organizations	<input type="checkbox"/> H	<input type="checkbox"/> M	<input type="checkbox"/> L	<input type="checkbox"/> NA