

Financial Fire Drills

What is your full name?

Sample

Do we have a household action plan to address these eight scenarios that commonly disrupt our financial wellbeing?

Please indicate if there is a 1.) confident action plan, 2.) no action plan, or if 3.) review or modification is warranted.

Liquidity Needs: Do we have sufficient access to emergency capital?

✓ We have an action plan

We have no action plan

We need to revisit our plan

Long-Term Disability: Can we afford to live on a fraction of our lifetime earnings?

✓ We have an action plan

We have no action plan

We need to revisit our plan

Loss of Life: What financial obligations have we made?

✓ We have an action plan

We have no action plan

We need to revisit our plan

Long-Term Care: Does it make sense to self fund?

✓ We have an action plan

We have no action plan

We need to revisit our plan

Longevity: Do we have enough to fund our long-term spending goals past normal mortality?

✓ We have an action plan

We have no action plan

We need to revisit our plan

Liability: Are we prepared for asset predators?

✓ We have an action plan

We have no action plan

We need to revisit our plan

Legal: Are our documents in order and up-to-date?

✓ We have an action plan

We have no action plan

We need to revisit our plan

Legacy: What is our intended financial legacy?

✓ We have an action plan

We have no action plan

We need to revisit our plan
