DESTINYCAPITAL

Year Ahead Review

We know that life is always changing. As we move into the new year, we wanted to check-in and learn what is top of mind for you in 2022. Your answers will help us in adding significant value to your plan and experience in the year ahead!

[Share Your Updates ➞]

Thank you for your trust and partnership with us. We look forward to making 2022 our best year together yet!

YOUR TEAM

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Year Ahead Review

It's time to take a pulse. Please take 5-10 minutes to respond to the following questions. Your responses will provide us with a snapshot of where you are currently at moving into the new year so that we can better serve you.

1. Your Name(s):
Please provide your first and last name(s)

2. Email(s):
Your preferred email address(es) for us to contact you in 2022

Your Financial Plan

Rest assured that we are proactively managing and monitoring all these areas for you on an on-going basis and will always share our advice and recommendations accordingly.

3. Which areas of focus are most meaningful to you in 2022? *

- ☐ Investment Planning
- ☐ Updated Retirement Projections
- ☐ Financial Goal Review
- ☐ Cash Flow & Liquidity
- ☐ Estate Planning
- ☐ Long-Term Care Planning
- ☐ Tax Efficiency
- ☐ Debt Review
- ☐ Insurance (Life or Disability)
- ☐ Impact Planning (Charitable Giving, Legacy planning)
- ☐ Healthcare/Medicare

Other: ____

____

4. What big decisions or new large expenses (if any) are you thinking about for next year that you haven't shared with us yet?

Your Financial Plan

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5. Do you prefer in-person or remote meetings with us? (check one)

___ In-Person
___ Remote (Zoom)
___ Both

6. What makes a meeting successful for you?

While we know you well, we know that one thing in life is constant—change.

7. What are you excited about in 2022?

8. What could you do within the next year to make your life more fulfilling?

9. What updates—if any—do you have to your long-term goals?

We believe feedback is our friend.

We are here to serve you and invite you to continue to share ways we can best show up for you and your family.

10. What is one way we can make your experience even better with us this year?