# Jackson Entreprises Financial Check In

## A guided first look at your goals, money, protection, and next steps

This is not a test, and there are no perfect answers. Best estimates are welcome. Complete what you can, skip anything you do not know, and use this as the starting point for our conversation.

**Most people finish in about 10 to 15 minutes.** For your protection, do not include Social Security numbers, complete account numbers, passwords, or login information.

## 1 DIRECTION AND PRIORITIES Start with what matters, not with numbers.

| | |
|---|---|
| **Full name** | **Preferred name** |
| **Date** | **Best phone or email** |

**1. What made you ask for help now?**

**2. What are you working toward financially? Select up to three.**

☐ Less debt ☐ Emergency savings ☐ Retirement ☐ Protecting family ☐ Buying a home
☐ More income ☐ Understanding my accounts ☐ Leaving a legacy ☐ Other

**3. If nothing changed over the next 3 to 5 years, what would concern you most?**

**4. One year from now, what would need to improve for you to feel glad we had this conversation?**

## 2 MONEY TODAY Best estimates are perfectly fine.

| | |
|---|---|
| **Employment or occupation** | **Spouse or partner occupation** |
| **Household take home income per month** | **Regular monthly expenses** |
| **Amount usually left after bills** | **Emergency savings balance** |

**5. How consistent is your monthly cash flow?**

☐ Very consistent ☐ Mostly consistent ☐ Varies with overtime or commissions ☐ Frequently tight ☐ Unsure

**6. About how many months of expenses could your emergency savings cover?**

☐ Less than 1 month ☐ 1 to 3 months ☐ 3 to 6 months ☐ More than 6 months ☐ I do not have one yet

**7. Which debts would you most like to reduce or eliminate?**

| Debt type | Approximate balance | Monthly payment |
|---|---|---|
| Credit cards | | |
| Auto loans | | |
| Student or personal loans | | |
| Other priority debt | | |

**8. What money issue creates the most stress or deserves attention first?**

## 3 RETIREMENT AND RESOURCES Let us see what is already working for you.

**9. Which workplace benefits do you currently have? Select all that apply.**

☐ Pension ☐ 457 or Deferred Compensation ☐ 401(k) ☐ 403(b) ☐ Employer match
☐ Employer life insurance ☐ Disability coverage ☐ HSA ☐ Retiree medical ☐ Unsure

| | |
|---|---|
| **Your retirement contribution amount or percent** | **Employer contribution or match** |
| **Approximate total retirement savings** | **Target retirement age or years away** |

**10. Which accounts or resources do you have outside your current workplace plan?**

☐ Savings ☐ Traditional IRA ☐ Roth IRA ☐ Old workplace plan ☐ Brokerage account
☐ Annuity ☐ Cash value life insurance ☐ Real estate ☐ Business interest ☐ None or unsure

**11. Do you have old accounts from former employers or accounts you are unsure how to manage?**

**12. How confident are you that your current path can produce the future you want?**

Low confidence 1 2 3 4 5 6 7 8 9 10 Very confident Score (1-10):

**13. How comfortable are you with market ups and downs?**

☐ Comfortable with significant changes ☐ Somewhat comfortable ☐ Prefer limited volatility
☐ Not comfortable with losses ☐ I am not sure

**14. What feels strongest about your current strategy, and what feels incomplete or uncertain?**

## 4 PROTECTION AND NEXT STEPS Protect what matters and focus the conversation.

**15. Who currently depends on you financially or may depend on you in the future?**

☐ Spouse or partner ☐ Children ☐ Grandchildren ☐ Parents ☐ Other family ☐ No one currently

**16. What protection and planning do you currently have?**

☐ Employer life insurance ☐ Personal term life insurance ☐ Permanent or cash value life insurance
☐ Disability coverage ☐ Critical illness coverage ☐ Long term care coverage ☐ Will or trust
☐ Power of attorney or healthcare directive ☐ Updated beneficiaries ☐ None or unsure

**17. If something happened to you tomorrow, would the people depending on you be financially okay?**

☐ Yes ☐ No ☐ Not sure ☐ No one currently depends on me

**18. Who or what are you most concerned about protecting?**

**19. What financial question have you been meaning to ask someone?**

**20. If I identify something that could improve your current situation, how would you like me to handle it?**

☐ Point it out and explain it ☐ Ask me before exploring it ☐ Focus only on the concern I listed

**21. How would you prefer to continue the conversation?**

☐ Phone ☐ Text ☐ Email ☐ Video meeting ☐ In person

**22. Anything else you would like me to know before we talk?**

**Clarity first. Strategy second. Recommendations only when they fit.**