The Retirement Distribution Planning Diagnostic™

This self-assessment tool helps you to identify possible areas of concern in your retirement distribution planning. Indicate the degree to which you *agree* or *disagree* with the statements below. Once you are finished, total your score.

	Disagree									Agree	Score
1. I have a documented methodology to forecast my retirement income needs for the first 25 years of my retirement.	1	2	3	4	5	6	7	8	9	10	
2. I have implemented an effective strategy to estimate my Pension "Gap" (i.e. estimated social security and/or other income less the amount of money needed in retirement) for at least the first 25 years of my retirement.	1	2	3	4	5	6	7	8	9	10	
3. I utilize defined investment guidelines when selecting my investments to help reduce the risk and volatility in my portfolio.	1	2	3	4	5	6	7	8	9	10	
4. My investment strategy seeks to increase the purchasing power of my portfolio value by reducing the damaging effects of taxes and inflation.	1	2	3	4	5	6	7	8	9	10	
5. I have an efficient method to measure, monitor and respond to my investment results every 90 days.	1	2	3	4	5	6	7	8	9	10	
6. I have a strategic and tactical approach that considers the tax consequences of my retirement accounts and seeks to use income-tax free investment vehicles wherever and whenever appropriate.	1	2	3	4	5	6	7	8	9	10	
7. All parts of my long-term care plans are well-defined and carefully organized in order to minimize disruption in my loved ones' daily lives.	1	2	3	4	5	6	7	8	9	10	
8. I have a system to keep my beneficiary designations up to date and complete.	1	2	3	4	5	6	7	8	9	10	
9. I have carefully named my beneficiaries, using per stirpes as necessary, to avoid disinheriting a loved one, such as a grandchild.	1	2	3	4	5	6	7	8	9	10	
10. I have compiled a comprehensive file of resources (documents and information) enabling my executor to carry out my wishes in the most efficient, cost effective and timely manner.	1	2	3	4	5	6	7	8	9	10	

Securities and investment advisory services offered through H. Beck, Inc. Member FINR/SIPC.
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TOTAL SCORE

Notes:

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(Use back of page if necessary)

Name: _____

Phone Number: _____

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