North Star Resource Group 612.617.6000

northstarfinancial.com



Goals and Objectives

(Please check according to importance)

Not Important		Neutral		Very Important	
0	0	0	0	0	I wish to get my finances in order and establish a financial strategy
0	0	0	0	0	I want to sell appreciated assets and minimize taxes*
0	0	0	0	0	I want to ensure my family could maintain its lifestyle should something happen to me
0	0	0	0	0	I want to protect my income against the possibility of a disability
0	0	0	0	0	I want to protect my assets and do not want to become a burden to my family if I become ill
0	0	0	0	0	I want to know if the investments I have are appropriate for my current situation
0	0	0	0	0	I want to review my portfolio for efficiency
0	0	0	0	0	I want to develop a long-term investment strategy
0	0	0	0	0	I want to develop a retirement strategy
0	0	0	0	0	I want to create/review my wills/trusts*
0	0	0	0	0	I want to develop asset protection strategies
0	0	\circ	\circ	0	I want to help minimize the expense of estate transfer taxes*
0	0	0	0	0	I want to address liquidity shortfalls needed to pay estate taxes*
0	0	0	0	0	I want to ensure my business will continue in the event of a death or disability
0	0	0	0	0	I want to use my business to help maximize personal benefits
0	0	0	0	0	I want to retain my most valued employees over time

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^{*}Financial Advisors do not provide tax or legal advice and this should not be considered as such. Please consult a tax or legal professional for advice regarding your specific situation.