



A Strategic Financial Planning & Advisory Firm for Creating & Managing Wealth

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Winning Your Money Game Quiz

What is your Money Game? The answer lies in what matters most to you.
What would financial planning help you achieve in your finances?

Start the Quiz!

Choose Your Top 5 Topics

- Set Priorities & Create a Plan
- Manage My Investments
- Use Leverage to Grow Wealth
- Plan for the Unexpected
- Fund a Major Purchase or Goal
- Protect My Income
- Protect My Assets
- Minimize Taxes
- Manage Debt
- Save for Retirement
- Fund Education Expenses
- Retirement Income
- Prepare for an Illness or Incapacity
- Health Care Expenses
- Care for a Family Member
- Guard Against Inflation
- When & How to Take Social Security
- Living in Retirement
- Update or Prepare an Estate Plan
- Plan for Business Succession
- Create a Positive Impact on Society
- Support a Charitable Cause
- Leave a Legacy
- Help Others

Top 5 Areas of My Financial Plan 2021

1. _____
2. _____
3. _____
4. _____
5. _____

Choose 3 of Your Top 5 Topics

Top 3 Areas of My Financial Plan 2021

1. _____
2. _____
3. _____

My #1 Financial Planning Topic

1. _____

What is Your #1 Topic?

Get Started on Your Plan!

Meet with Mary for a complimentary session to talk about accomplishing what matters most to you. Make this your year to make what really matters to you happen!