

Fill out the following questions and press the **submit** button to see results:

- Yes No Are your vehicle and home insurance deductibles as high as possible?
- Yes No Do you have a liability umbrella?
- Yes No Do you have medical and disability insurance?
- Yes No Are you using only term life insurance?
- Yes No Do you have a current will or trust?
- Yes No Have you appointed guardians for your minor children?
- Yes No Do you have a place for important papers?
- Yes No Are you saving money on a regular basis?
- Yes No Are you compounding or reinvesting in a taxable account?
- Yes No Are you dollar cost averaging into mutual funds?
- Yes No Are you using only the stock market for building wealth?
- Yes No Are you using only real estate for building wealth?
- Yes No Are you using annuities to build wealth?
- Yes No Are you contributing to 529 plans or uniform gifts to minor's accounts?
- Yes No Are you contributing more than the match to 401(k)s and 403(b)s?
- Yes No Are you adding new money to IRAs and Roth IRAs?
- Yes No Are you counting opportunity costs?
- Yes No Are you learning how to use your death benefit while living?