



HOW WE CAN HELP

Name: _____ **Phone:** _____

Address: _____

Email: _____

PLEASE CHECK ANY TOPICS YOU MAY WANT TO REVIEW WITH OUR TEAM:

Our Goal Is To Make Sure Every Part of Your Plan Works Together.

Medicare Coverage Options

- ☐ **Medicare Advantage**
- ☐ **Medicare Supplements**
- ☐ **Prescription Drug Plans**

Additional Protection Options

- ☐ **Dental/Vision/Hearing**
- ☐ **Hospital Indemnity Plans**
- ☐ **Cancer Coverage**
- ☐ **Critical Illness Coverage**
- ☐ **Long-Term Care Planning**

Life Insurance Options

- ☐ **Final Expense**
- ☐ **Term Life**
- ☐ **Permanent Life (Whole & IUL)**

Do You Currently Have Life Insurance in Place?

☐ Yes ☐ No ☐ Don't Know

Retirement and Income Planning

- ☐ **Income Planning**
- ☐ **Market Safe Strategies**
- ☐ **Proactive Tax Planning**
- ☐ **Estate Planning**

Would You Like To Review How Medicare Costs Fit Into Your Retirement Plan? ☐ Yes ☐ No

Debt Elimination

How Would Your Financial Picture Change if You Were 100% Debt-Free?

Are You Currently Paying Extra on Your Debts Every Single Month?

Would You Like To Schedule a Debt Elimination Consultation? ☐ Yes ☐ No

Estate Planning

Is It Time To Review Your Wills & Trusts?
☐ Yes ☐ No

Helping Individuals, Families and Business Owners Secure Their Future and the Future of Their Loved Ones

QUICK RETIREMENT ASSESSMENT



I ncome	Do you have a retirement income plan that guarantees you won't run out of money?	YES or NO	Our team builds customized income plans that allow you to live out your best retirement!
M arket Safe Plan	Do you have a plan to protect yourself from the next big market downturn?	YES or NO	Our team has tools and strategies that create safe, strong, and predictable growth while avoiding the next market downturn.
P roactive Tax Plan	Do you have a proactive tax plan for your retirement accounts?	YES or NO	Our team implements a proactive tax planning approach that allows you to keep more for you and your family and less for Uncle Sam.
A sset Protection & Estate Planning	Do you have an estate plan to insure you avoid unnecessary probate fees and taxes?	YES or NO	Our team helps you evaluate the best estate planning tools possible to make sure you are leaving a legacy and not a mess for your loved ones.
C are Plan – Health & Long-Term Care	Do you have a plan to protect your family and your assets from the rising costs of long-term care?	YES or NO	Our team reviews and implements strategies to safeguard your retirement nest-egg from the most dangerous threat which are the costs related to Long-Term Care.
T ransparent & Low Investment Fees	Do you know how much your investment fees are costing you per year or over the course of your retirement?	YES or NO	Our team not only brings visibility to those costs, but they make sure that the fees and costs that are paid are on a flat fee basis and are aligned with the services and value delivered.



SCAN TO SCHEDULE

**If you answered NO to one or more...
Schedule Your Free On-Track
Retirement Review today!**

Join us for a **Virtual Complimentary Comprehensive Retirement Overview** on **Zoom**, offering personalized financial insights from the comfort of your home. We will help you navigate your financial landscape, addressing tax, investment, and retirement plans.

Lasting Mark Retirement Group, LLC is a Registered Investment Advisory Firm. Lasting Mark Retirement Group, LLC may only transact business in those states in which it is registered or qualifies for an exemption or exclusion from registration requirements.

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