

Prioritize your needs. Then we'll help you meet them.

Get started in meeting your financial objectives by assessing your needs, and then we can work with you to find a solution.

Answer the questions below and rank each category from 1 (highest priority) to 5 (lowest priority).

____ Priority

Retirement income

- ☐ Yes ☐ No Are you confident you're saving enough to sustain your standard of living during retirement?
- ☐ Yes ☐ No Would you like to see a projected calculation based on your savings to determine if you're on track to having enough retirement income?

____ Priority

College saving

- ☐ Yes ☐ No Will you be able to realize your dream of a college education for your children or grandchildren?
- ☐ Yes ☐ No Would you like to discuss potential solutions?

____ Priority

Income protection

- ☐ Yes ☐ No If you become too sick or hurt to work, could you make ends meet?
- ☐ Yes ☐ No Would you like to see a calculation of your potential need?

____ Priority

Estate planning

- ☐ Yes ☐ No Do you have a will?
- ☐ Yes ☐ No Does it accurately reflect how you want your assets distributed?
- ☐ Yes ☐ No Would you like to see a projected estate tax liability report?

____ Priority

Survivor income

- ☐ Yes ☐ No Without your financial contribution to the household, could your family meet ongoing living expenses and maintain their long-term financial goals, such as college funding and retirement?
- ☐ Yes ☐ No Would you like to see a calculation of your projected need?



principal.com

Insurance products issued by Principal National Life Insurance Company (except in NY), Principal Life Insurance Company®, and the companies available through the Preferred Product Network, Inc. Plan administrative services provided through Principal Life Insurance Company®. Referenced companies are members of the Principal Financial Group®, Des Moines, IA 50392.

Not FDIC or NCUA insured
May lose value • Not a deposit • No bank or credit union guarantee
Not insured by any Federal government agency

Principal®, Principal Financial Group®, and Principal and the logomark design are registered trademarks of Principal Financial Services, Inc., a Principal Financial Group company, in the United States and are trademarks and service marks of Principal Financial Services, Inc., in various countries around the world.