

## Common Moments of Truth

Review Date: \_\_\_\_\_

---

- \_\_\_\_\_ Getting Married\*
  - \_\_\_\_\_ Wedding Anniversary (milestone)\*
  - \_\_\_\_\_ Birthday (milestone)\*
  - \_\_\_\_\_ Birth of a child (grandchild)\*
  - \_\_\_\_\_ Adoption of a child (grandchild)\*
  - \_\_\_\_\_ Child (grandchild) goes off to college
  - \_\_\_\_\_ Retirement Savings\*
  - \_\_\_\_\_ Retirement Income\*
  - \_\_\_\_\_ Estate Planning\*
  - \_\_\_\_\_ Empty nester\*
  - \_\_\_\_\_ Promotion at work or other work accomplishment\*
  - \_\_\_\_\_ Change in career
  - \_\_\_\_\_ Graduation (Degree, Designation, Exam, Course, etc.)
  - \_\_\_\_\_ Purchase New Home
  - \_\_\_\_\_ Purchase Vacation Home
  - \_\_\_\_\_ Purchase Recreational Vehicle (sports car, sail boat, motorcycle,
  - ic.) \_\_\_\_\_ Purchase or Sell Business Assets
  - \_\_\_\_\_ Go on Vacation
  - \_\_\_\_\_ Other personal or professional accomplishments
  - \_\_\_\_\_ Client Account Anniversary
  - \_\_\_\_\_ Account Milestone
  - \_\_\_\_\_ Divorce
  - \_\_\_\_\_ Client sick
  - \_\_\_\_\_ Client in hospital
  - \_\_\_\_\_ Client well again or overcomes the odds
  - \_\_\_\_\_ Client passes away\*
  - \_\_\_\_\_ Spouse, child, relative, etc. of client passes away\*
  - \_\_\_\_\_ Other personal obstacles or tragedies
  - \_\_\_\_\_ Taxes\*
  - \_\_\_\_\_ Social Security Income\*
- 
-