

Take the Retirement **\$**Stress Test



The Three Little Pigs Test

Check the following statements that apply to you to determine how your financial foundation would survive the attacks of the Big Bad Wolf.

- I understand how the taxation system and the brokerage industries work... how they pertain to me and how I can use these systems to my full advantage
- I know that I am paying the very least amount of tax legally possible
- I feel that all available techniques to benefit my financial situation are fully explained to me every year
- I have implemented the newest technologies to guarantee my income lasts as long as I do. I spend as much as I want without worry of running out of money
- I have clear, written goals and plans to achieve them
- I have reviewed all the hybrid investment techniques and protection mechanisms developed in the last 5 years
- I know how much, within \$100, I pay in tax as a result of my investments... and how much I pay in fees as they relate to my investment portfolio
- I understand how the tax law changes of July 2001 (EGTRRA) affect my family. I have utilized it to pass on a significantly higher percentage of my assets to my heirs
- I have reviewed all long-term care options (LTC Insurance, Asset-Based Protection, MoneyGuard, Kennedy-Kassenbaum Plan) and am comfortable with the choices I've made
- I am in control of my financial fate, NOT the other way around. I control my finances... my finances do not control me



your
Score 

1-4 House made of straw

5-8 House made of sticks

9-10 House made of bricks