

FINANCIAL WELLNESS ASSESSMENT



Society is constantly urging us to strive to improve our personal wellness. In response, you may visit friends and family to maintain social and emotional wellness. You may visit your doctor for an annual check-up to maintain physical wellness. However, when was the last time you visited your Stifel Financial Advisor to assess your financial wellness? While most people diligently track other areas of personal wellness, they often neglect financial wellness. Using Stifel's Financial Wellness Assessment as a starting point, we challenge you to make financial wellness a priority. Fill out the information requested and then visit with your Stifel Financial Advisor to conduct a comprehensive review of your financial situation.

Name: _____

E-mail: _____ Phone: _____

Address: _____

City: _____ State: _____ Zip: _____

FINANCIAL ASSETS

BANK ACCOUNTS

CUSTODIAN	OWNER	VALUE	POD (Y/N)

TAXABLE INVESTMENT ACCOUNTS

CUSTODIAN	OWNER	VALUE	TOD (Y/N)

RETIREMENT ACCOUNTS (e.g., IRA, 401(k), 403(b), etc.)

TYPE	CUSTODIAN	OWNER	VALUE	BENEFICIARY

LIFE INSURANCE/ANNUITIES

TYPE	COMPANY	OWNER	INSURED	DEATH BENEFIT	BENEFICIARY

FINANCIAL WELLNESS ASSESSMENT *(continued)*

OTHER ASSETS

TYPE	OWNER	VALUE	TOD (Y/N)

LIABILITIES

TYPE	BORROWER	LENDER	OUTSTANDING BALANCE

ESTATE PLANNING

DOCUMENT	CLIENT (Y/N)	CO-CLIENT (Y/N)	LAST UPDATED
Will			
Revocable Living Trust			
General Power of Attorney			
Health Care Power of Attorney			
Advance Health Care Directive			

GENERAL PLANNING QUESTIONS

When did you last have a financial plan completed? _____

When did you last review your beneficiary designations? _____

When did you last have your estate and tax situation reviewed? _____

When did you last have your life insurance policies reviewed? _____



POD = Payable on Death
TOD = Transfer on Death