



# URA GROUP AZ

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## What's Important to You

Please number the five items that are the most important to you:

- Having enough income during retirement.
- Purchasing a retirement property or second residence.
- Providing for education of children or grandchildren.
- Family security in the event of premature death or a disability.
- Restructuring or eliminating debt.
- Legacy planning for estate.
- Positioning myself to enjoy more of the things in life I value.
- Providing capital for the charitable organizations that I support.
- Avoiding capital gains or excessive taxes on the sale of business interests or investments.
- Determining where and how to withdraw funds from investments to provide for my retirement income.
- Reducing the income taxes that are generated from my investments.
- Having a complete review of my investment portfolio to see what type of returns I have been getting and what type of risk I have been taking.
- Having someone study my investment profile and making recommendations on what type of portfolio, I should have.
- Protecting my assets from creditors and liability lawsuits
- Having peace of mind and a sense of security regarding my financial future.
- Other: \_\_\_\_\_  
\_\_\_\_\_

Name: \_\_\_\_\_

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