

# LIFE *transitions*



## Survey

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Name

Date

| Life Transitions |                                    | Currently experiencing | Anticipate short-term | Anticipate long-term  |
|------------------|------------------------------------|------------------------|-----------------------|-----------------------|
| Work             | 1. Change in career path           | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 2. New job                         | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 3. Promotion                       | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 4. Job loss                        | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 5. Job restructure                 | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 6. Education / retraining          | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 7. Sell or close business          | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 8. Transfer family business        | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 9. Gain a business partner         | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 10. Lose a business partner        | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 11. Downshift / simplify work life | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 12. Sabbatical / leave of absence  | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 13. Start or purchase a business   | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 14. Retire                         | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 15. Phase into retirement          | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 16. Other                          | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 17. Other                          | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |

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|------------------|---|------------------------|-----------------------|-----------------------|
| Financial        | 1. Purchase a home                            | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 2. Sell a home                                | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 3. Relocate                                   | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 4. Purchase a vacation home / timeshare       | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 5. Re-evaluate investment philosophy          | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 6. Experience investment gain                 | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 7. Experience investment loss                 | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 8. Debt concerns                              | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 9. Consider investment opportunity            | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 10. Receive inheritance or financial windfall | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 11. Sell assets                               | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 12. Other                                     | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 13. Other                                     | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |

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| Family           | 1. Change in marital status (marriage)                                      | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 2. Change in marital status (divorce)                                       | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 3. Change in marital status (widowhood)                                     | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 4. Expecting or adopting a child  | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 5. Hire child care  | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 6. Child entering adolescence   | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 7. Child with special needs (Disabilities, medical/dental problems)         | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 8. Child w/pre-college expenses (private school, tutor, lessons)            | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 9. Child going to college   | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 10. Child getting married   | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 11. Empty nest  | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 12. Family special event (Bat/Bar Mitzvah, anniversary party, special trip) | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 13. Helping and/or gifting grandchildren                                    | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 14. Concern about aging parent  | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 15. Concern about health of spouse or child                                 | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 16. Family member needs caregiving  | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 17. Concern about personal health   | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 18. Provide for long-term care (parent, spouse, or self)                    | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 19. Disability / hospitalization (self or family member)                    | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 20. Death of family member  | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 21. Other   | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 22. Other   | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |

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| Legacy           | 1. Increase charitable giving                             | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 2. Give special financial gifts to children/grandchildren | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 3. Give parental pension (monthly stipend)                | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 4. Develop an estate plan                                 | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 5. Change estate plan                                     | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 6. Develop an end of life plan                            | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 7. Other  | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |
|                  | 8. Other  | <input type="radio"/>  | <input type="radio"/> | <input type="radio"/> |