



Date: _____ Client Name(s): _____

Select the priority level (High, Medium, or low) of the life transitions that you are experiencing now or expect to experience in the near future. Leave all others blank.

	HIGH	MEDIUM	LOW
PERSONAL/FAMILY			
Getting Married			
Going through a divorce or separation			
Recent loss of your spouse (Widowhood)			
Expecting a child			
Adopting a child			
Need to hire childcare			
Child entering adolescence			
Child with special needs (disability/other)			
Child preparing for college			
Child going away to college			
Child getting married			
Empty nest			
Special family event			
Providing assistance to a family member			
Concerned about an aging parent			
Concerned about the health of spouse or child			
Concerned about personal health			
Family member in need of professional care			
Family member with a disability or serious illness			
Family member expected to die soon			
Recent death of family member			
Recent birth of a child			
Family member diagnosed with cancer			
Entering single parenthood			
WORK/CAREER			
Contemplating career change			
New job			
Job promotion			
Job loss			
Job restructuring			
New job training/education program			
Starting a new business			



	HIGH	MEDIUM	LOW
Gaining or losing a business partner			
Selling or closing a business			
Transferring business to family member			
Downshift/Simply work life			
Taking a sabbatical or leave of absence			
Phasing into a retirement			
Full retirement from current job/career			
Buying an existing business			
Expanding an existing business			

FINANCIAL/INVESTMENT

Selling a house			
Refinancing your mortgage			
Purchasing a home			
Relocating			
Reconsidering investment philosophy and risk profile			
Significant investment gain			
Significant investment loss			
Concerned about debt			
Considering an investment opportunity			
Receiving an inheritance or financial windfall			
Selling assets			
Considering changing financial service provider			

COMMUNITY/CHARITABLE

Give to other charitable organizations			
Monthly stipend to parent(s) (parental pension)			
Gifting to children/grandchildren			
Develop or review an estate plan			
Develop an end of life plan			
Creating or funding a foundation			
Creating or funding a scholarship fund			
Give to community causes/events			
Give to church or religious organizations			

All information provided will be kept private and confidential.