

# ANNUAL REVIEW

PREPARED FOR:

PREPARED BY:



## EXISTING ACCOUNTS:



Review of  
Existing Policies

Benefits/  
Features Of  
Contract

Interest Credit  
History

Review of  
Crediting  
Strategies

Liquidity  
Available

Changes To  
Be Made

Overview of Any  
Fees/Charges

## NOTES:

# SHORT TERM & LONG-TERM GOALS:



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## 1 YEAR PLAN

PERSONAL GOALS

FINANCIAL GOALS

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## 5 YEAR PLAN

PERSONAL GOALS

FINANCIAL GOALS

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## 10 YEAR PLAN

PERSONAL GOALS

FINANCIAL GOALS

## QUESTIONS TO CONSIDER:



*Does having enough money saved for retirement keep you up at night?*

*Is leaving a legacy for your family important to you?*

*Do you hold an investment from another financial institution or professional that no longer aligns with your current investment objectives?*

*Do you think the SECURE Act will impact your future financial goals?*

*Are you aware of uncapped growth potential with the Barclays Atlas 5 Boost strategy that has no annual fees?*

*Does your current portfolio have the ability to be in the right place in the world, at the right time? Can it diversify globally?*

*Have you heard how SILAC's annuities are designed to provide simplistic solutions with strong accumulation potential?*

*You likely have homeowner's insurance to protect your home and auto insurance to protect their vehicles... but do you have asset insurance or a means to minimize risk and volatility?*

**YOUR FINANCIAL PICTURE:**



**CHECKING/SAVINGS**

**ANNUITIES**

**IRA/401K**

**CERTIFICATES OF DEPOSIT (CD)**

**LIFE INSURANCE**

**OTHER**

**NOTES:**

**NEXT MEETING:**