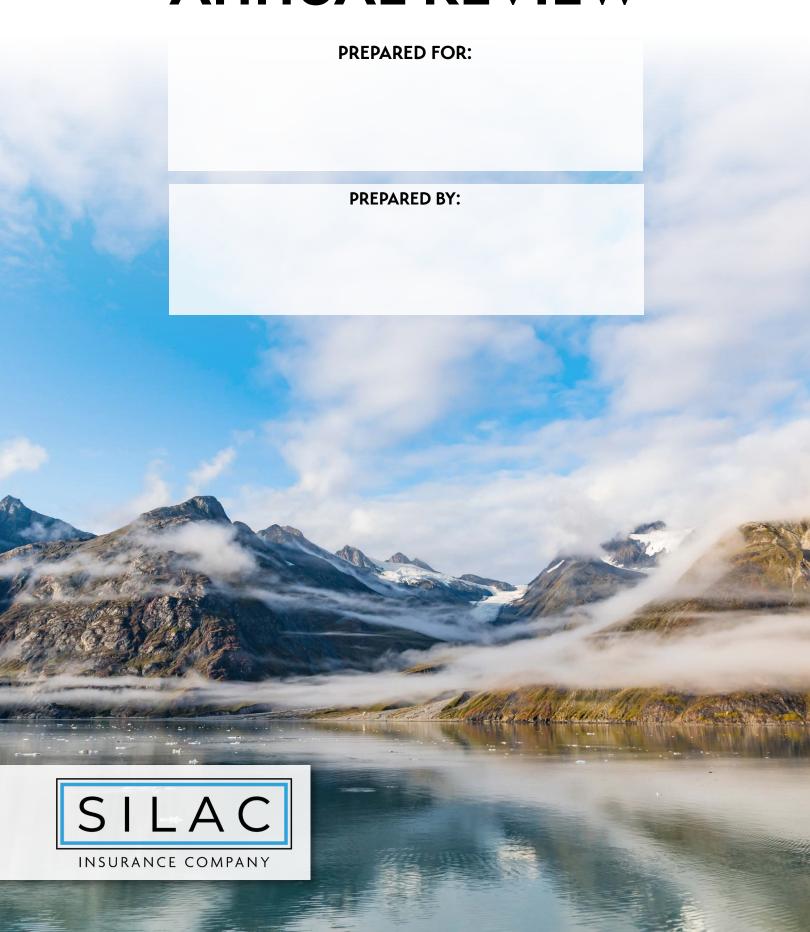
# **ANNUAL REVIEW**



# **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**



RM & LONG-TERM GOALS:	SILAC
ATTA EGITO TENT GOALS.	INSURANCE COMPANY
1 YEAR PLAN	
PERSONAL GOALS	FINANCIAL GOALS

#### **5 YEAR PLAN**

**PERSONAL GOALS FINANCIAL GOALS** 

## 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** 



