



The Timing Evaluation

Complete the table below with your client. List everyone for whom your client has financial responsibility. This exercise will help you and your client assess financial issues and needs and construct a comprehensive financial plan to help him/her prepare for significant financial milestones.

		Current Year 2007	Plus 5 Years 2012	Plus 5 Years 2017	Plus 5 Years 2022	Plus 5 Years 2027	Plus 5 Years 2032	Plus 5 Years 2037
Client's Name	Client's Age							
Spouse's Name	Spouse's Age							
Relative's Name	Relative's Age							
Relative's Name	Relative's Age							
Relative's Name	Relative's Age							
Relative's Name	Relative's Age							
Business Partner's Name	Business Partner's Age							
Other's Name	Other's Age							
Other's Name	Other's Age							
Other's Name	Other's Age							

For more detail, see Chapter 1 of *Advisor for Life*.

