



NAME: _____

EMAIL: _____

“advice that is **right** on the money”

“FROM PUZZLE TO BLUEPRINT” SCORECARD

To help you to sort out your future and to create retirement comfort, rate your reaction to each pair of phrases.
Decide where you are currently on a scale of 1 to 6 by circling your response.

PLEASE RETURN BY EMAIL ted@tedwernham.com or FAX 866.855.9819, so we can discuss

I know how much capital I need to retire	6	5	4	3	2	1	I have NO idea how much capital I need to retire
I plan to work as long as I reasonably can	6	5	4	3	2	1	I plan to stop work as soon as I reasonably can
My health is better than average my age	6	5	4	3	2	1	My health is worse than average my age
I will be living where I am now when retired	6	5	4	3	2	1	I will not be living where I am now when retired.
I do have an up to date Will	6	5	4	3	2	1	I do not have an up to date Will
I am/will be caring for elderly relatives/in laws	6	5	4	3	2	1	I will not be caring for elderly relatives/in laws
I think I will live to Age 85	6	5	4	3	2	1	I do not think I will live to Age 85
There are relatives who will care for the elderly me	6	5	4	3	2	1	There will be no one to care for the elderly me
I have a trusted advisor/Coach with whom I have regular contact	6	5	4	3	2	1	I do not have a trusted advisor/Coach with whom I have regular contact
I feel in control of my financial future	6	5	4	3	2	1	I do not feel in control of my financial future

THANK YOU!

Wernham Wealth Management Inc.

THE BOOMER WEALTH COACH