

# REVIEW SERVICES, INC.

FINANCIAL COUNSELORS

## CLIENT CONCERNS SURVEY

*Please put an "X" in the high, medium or low box for each topic.*

TOPIC	IMPORTANCE		
	HIGH	MEDIUM	LOW
Assuring Adequate Income			
Managing Retirement Income			
Medical Coverage			
Long-term Care Coverage			
Current Income from Investments			
Ability to Convert Investments to Cash			
Capital Appreciation of Investments			
Safety - Little or No Danger of Losing Investment Principal			
Tax Saving Techniques			
Avoiding Excessive Income Taxes			
Transferring Ownership at Death			
Minimizing Estate Costs			
Overall Investment Strategy incorporating Investments, Tax Savings and Estate Management			

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Signature

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Date

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Signature

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Date