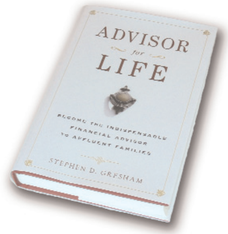
# The Timing Evaluation

PHOENIX

*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.*

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