

Thinking about legacy, how important are the following financial priorities to you? - Passing along money to my family

[illegible]

Thinking about legacy, how important are the following financial priorities to you? - Ensuring my estate is taxed as little as possible so my family receives a larger inheritance

[illegible]

Thinking about legacy, how important are the following financial priorities to you? - Ensuring my family receives money quickly so they aren't paying out-of-pocket for my funeral and other end-of-life expenses

[illegible]

How knowledgeable are you about the following insurance policies? - Term Life Insurance

[illegible]

How knowledgeable are you about the following insurance policies? - Universal Life Insurance

[illegible]

How knowledgeable are you about the following insurance policies? - Whole Life Insurance

[illegible]

How knowledgeable are you about the following insurance policies? - Segregated Funds

[illegible]

How knowledgeable are you about the following insurance policies? - Payout Annuities

[illegible]

How knowledgeable are you about the following insurance policies? - Disability Insurance

[illegible]



