

# 4 Powerful Profiling Questions



W&S Financial  
Group Distributors

A member of Western & Southern Financial Group

Find out if an asset transfer plan is a good fit for you

## 1 When do you plan to spend this money?

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## 2 What would force you to spend this money?

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## 3 If you don't spend this money, who do you want to receive it?

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## 4 How would you like to see your beneficiaries receive this money — taxable or generally tax free?

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