

## What's Important to **You?**

**One size does not fit all when it comes to your financial future. We can help!**

You have goals for your financial future. Perhaps a comfortable retirement. Or providing a legacy for your loved ones. Because plotting your financial course isn't a one-size-fits-all proposition, it's important your financial professional understands what's important to **you**.

Use this short worksheet to rank the features you weigh when considering potential money moves. Then let's talk about financial steps that may help you manage your risks and set you on the path toward your goals.

| Rank the Following from Highest (1) to Lowest (8) |   |
|---|---|
|   | Competitive Interest Rates                              |
|   | Strong Issuer Ratings                                   |
|   | Legacy Planning   |
|   | Tax Advantages  |
|   | Liquidity (Access to Your Money)                        |
|   | Lifetime Minimum Guarantee                              |
|   | Upside Growth Potential with Downside Income Protection |
|   | Income for Life   |

*Ask your financial professional for information on strategies that help address your needs.*

W&S Financial Group Distributors, Inc., Cincinnati, OH (doing business in CA as W&S Financial Insurance Services) is an affiliated life insurance agency of the issuer. Issuer has sole financial responsibility for its products. All companies are members of Western & Southern Financial Group.

**No bank guarantee • Not a deposit • May lose value • Not FDIC/NCUA insured • Not insured by any federal government agency**

© 2009-2023 Western & Southern Financial Group. All rights reserved.