

NORTHBEAM FINANCIALS

Retirement Clarity Checklist

For Ages 30–50

A simple 5-minute reset for financial confidence

3 BENEFITS

“Term/IUL /
Annuities” path

- ✓ Protect your family
- ✓ Strengthen your future
- ✓ Know your next best step



Guiding You Toward Financial Clarity



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Body

SECTION 1

1) Your Retirement Vision

- ☐ Retirement age goal: _____
- ☐ Monthly income goal: \$ _____
- ☐ Lifestyle goal: ☐ Travel ☐ Stay Put ☐ Downsize ☐ Not Sure Yet

Clarity first — perfection later.

SECTION 2

2) Family Protection Check

- ☐ Do I have life insurance right now? ☐ Yes ☐ No
- ☐ Would my family be financially protected if something happened to me?
- ☐ Yes ☐ No
- ☐ Final expenses plan in place? ☐ Yes ☐ No

SECTION 3

3) Savings + Stability

- ☐ Emergency goal: ☐ \$500 ☐ \$1,000 ☐ 1-month expenses
- ☐ Weekly savings amount: \$ _____
- ☐ Can I automate it? ☐ Yes ☐ No

SECTION 4

4) Debt + Cash Flow Clarity

- ☐ Biggest stress category: _____
- ☐ One change I can make this week: _____
- ☐ My focus right now: ☐ PROTECTION ☐ SAVE ☐ DEBT ☐ RETIREMENT

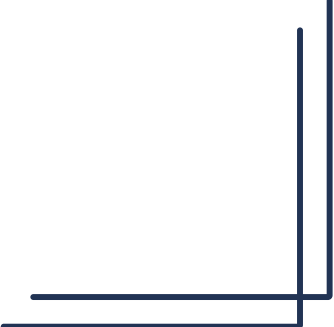
SECTION 5

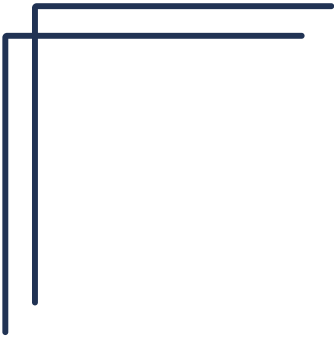
5) Your Next Best Step

- ☐ I want more: ☐ Protection ☐ Growth ☐ Guaranteed Income ☐ Flexibility
- ☐ I want a simple plan review: ☐ Yes ☐ No
- ☐ Best contact method: ☐ Email ☐ Phone



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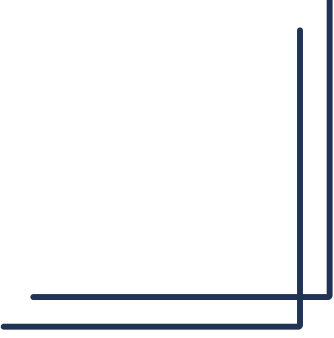
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Want help turning this checklist into a
simple plan?

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 **Comment: RETIREMENT**



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