



STERLING WEALTH ADVISORS

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LIFE TRANSITIONS SURVEY

	Experiencing Now:	Anticipate Short-term (1-3 years)	Anticipate Long-term (3+ years)
WORK TRANSITIONS			
1 Career change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 New job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 Promotion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 Loss of job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 Job restructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 Education/Retraining	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 Sell or close business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8 Transfer family business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 Gain a business partner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 Lose a business partner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 Downshift/Simplify work life	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12 Sabbatical/Leave of absence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13 Start or purchase a business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14 Retire	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15 Phase into retirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16 Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FINANCIAL TRANSITIONS			
1 Purchase a home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 Sell a home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 Relocate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 Purchase a vacation home/timeshare	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 Want to re-evaluate investment philosophy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 Debt concerns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 Considering investment opportunity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8 Will receive inheritance or financial windfall	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Experiencing Now:	Anticipate short-term (1-3 years)	Anticipate long-term (3+ years)	
FAMILY TRANSITIONS				
1	Change in marital status - marriage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Change in marital status - divorce	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Change in marital status - widowhood	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Start a family or expect a new baby	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Hire child care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Child moving into adolescence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Child experiences/special needs (orthodontics, extra activities, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Child education, pre-college expenses (private school, tutoring)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Child going to college	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Child getting married	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Empty nest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	Family special event (trip, bar mitzvah, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	Expecting grandchild(ren)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14	Grandchildren need help (education, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15	Declining health of a parent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16	Concern about health of a spouse or child	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17	Family member needs care giving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18	Family member moving into my home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19	Concern about personal health	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20	Provide for long-term care of parent, spouse, or self	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21	Disability/hospitalization (self or family member)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22	Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEGACY TRANSITIONS				
1	Increase benevolence (planning/charitable giving)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Give special financial gifts to children (annual gifting, down payment for home, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Give parental pension (monthly stipend for parent)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Develop an estate plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Change estate plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Develop an end of life plan (funeral expenses, living will, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>