



## MOUNTAIN VIEW INVESTMENTS

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### Is Wealth Management Right for You?

Answer these quick questions to see if a personalized wealth management plan could help you pursue your goals more confidently.

#### Checklist — Mark Yes or No (single-spaced list)

- I have clear, written financial goals (retirement age/amount, legacy, education, major purchases). Yes / No
- My investment accounts and strategies are coordinated to support those goals. Yes / No
- I understand the tax implications of my investments and distributions. Yes / No
- I have a documented plan for income in retirement (sources, timing, tax treatment). Yes / No
- My portfolio is diversified across asset classes and tailored to my risk tolerance. Yes / No
- I have a rebalancing and downside-risk plan for market downturns. Yes / No
- I regularly receive clear reporting and performance reviews. Yes / No
- I have an estate plan or beneficiary strategy aligned with my wishes. Yes / No
- I avoid making emotional, impulsive investment decisions during market volatility. Yes / No
- I have confidence my plan addresses taxes, cash flow, and legacy together. Yes / No

#### Scoring

- 8–10 Yes: You likely have many elements of wealth management in place. Consider a brief review to identify tax efficiency or consolidation gains.
- 4–7 Yes: A personalized wealth management plan could add measurable value by coordinating investments, taxes, and goals.
- 0–3 Yes: You may benefit significantly from a comprehensive wealth management engagement.

#### Next Steps

- If you scored 0–7, contact Gene for a complimentary review of how to increase or maintain your wealth and a short, prioritized action plan.
- To schedule a complimentary consultation: [click here and fill in details](#) or call **626-890-8922**
- Want a personalized checklist review? Email [gene@mtnvi.com](mailto:gene@mtnvi.com) and include your score.

#### Did you know?

Taxes and sequence-of-returns risk can reduce retirement income by 20 to 30%. Ask Gene how to protect yours.

**Compliance / Disclaimer:** This material is for informational purposes only and does not constitute individualized investment advice. Past performance is no guarantee of future results. Consult Mountain View Investments, LLC, or your financial advisor for advice tailored to your circumstances.

Our inspiration “I lift up my eyes to the hills. From where does my help come from? My help comes from the LORD, who made heaven and earth.” ~ Ps. 121:1-2 ESV

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