

Worksheet # 5: Life Events' Planning

Life Transition Profile

We enter into life transitions as a result of planned or unplanned events or changes that continue to happen in our lives. All life transitions have an effect on our finances in some way. By exploiting each life transition that we experience, we are better equipped to navigate successfully through them. Please indicate (by checking) after each life event item in the following table according to probability or priority (high, medium, low or not applicable).

Life's Event	High	Medium	Low	Not Applicable
Personal/Self				
1. Getting married				
2. Going through separation				
3. Recent loss of spouse (widowhood)				
4. Expecting a child				
5. Adopting a child				
6. Need to hire child care				
7. Child entering adolescence				
8. Child with special needs (disability/others)				
9. Child preparing for education (primary, secondary, college)				
10. Child getting married				
11. Family special event				
12. Providing assistance to a family member				
13. Concerned about aging parent/s				
14. Concerned about health of spouse and child				

Life's Event	High	Medium	Low	Not Applicable
15. Concerned about personal health				
16. Family member in need of professional care				
17. Family member with disability or serious illness				
18. Family member expected to die soon				
19. Recent death of a family member				
20. Entering single parenthood				
21. Other				
22. Other				
Work/Career				
23. Contemplating career change				
24. New job				
25. Job loss				
26. Job restructuring				
27. New job training/education program				
28. Starting new business				
29. Selling or closing business				
30. Transferring business to a family member				
31. Downshift/simplify work life				
32. Taking sabbatical leave of absence				
33. Phasing retirement from current job				
34. Full retirement from current job				

Life's Event	High	Medium	Low	Not Applicable
35. Buying an existing business				
36. Expanding an existing business				
37. Other				
38. Other				
Financial/Investment				
39. Selling a house				
40. Purchase a house				
41. Relocating				
42. Significant investment gain				
43. Significant investment loss				
44. Concerned about debt				
45. Considering an investment opportunity				
46. Receiving an inheritance				
47. Selling assets				
48. Concerned about financial sustainability (not being able to meet financial needs and fulfill financial life goals)				
49. Other				
50. Other				
Community/Charitable Action				
51. Give to other charitable organizations				
52. Monthly support to parents				
53. Gifting to children/grandchildren				
54. Develop or review and estate plan				

Life's Event	High	Medium	Low	Not Applicable
55. Develop an end life plan				
56. Creating or funding a foundation				
57. Give to community causes and events				
58. Give to church or religious organizations				
59. Other				
60. Other				