



Name: Henil Shah

Date: 2021-03-26

Report:

Digital Footprint:

My phone has a password	No
My Computer has a password	Yes
I have a centralized list of passwords	Yes

No Place Like Home:

I am currently a homeowner	Yes
I currently rent or lease my residence	Yes
Other (Residence)	No

Guaranteed Protection:

I have Health Insurance	No
I have Life Insurance	Yes
I have Disability Insurance	No

Paying the Bills:

I am currently employed	No
I am a currently unemployed	No
I am a Business owner/Self-Employed	Yes
I am happily retired	No

Thinking Of The Future:

I have a Will	No
I appointed an Attorney to manage my finances	No
I have already created an Advance (Health) Directive	No

Those Who Depend On Me:

I have children under the age of 18	No
I have adult dependents	No
I have pets	Yes

Relationships:

I am single	No
I have a partner or spouse	No
I have a different situation	Yes

A Helping Hand:

I have a financial planner	No
I have an accountant	No
I have a power of attorney	No
I have a legal guardian	No