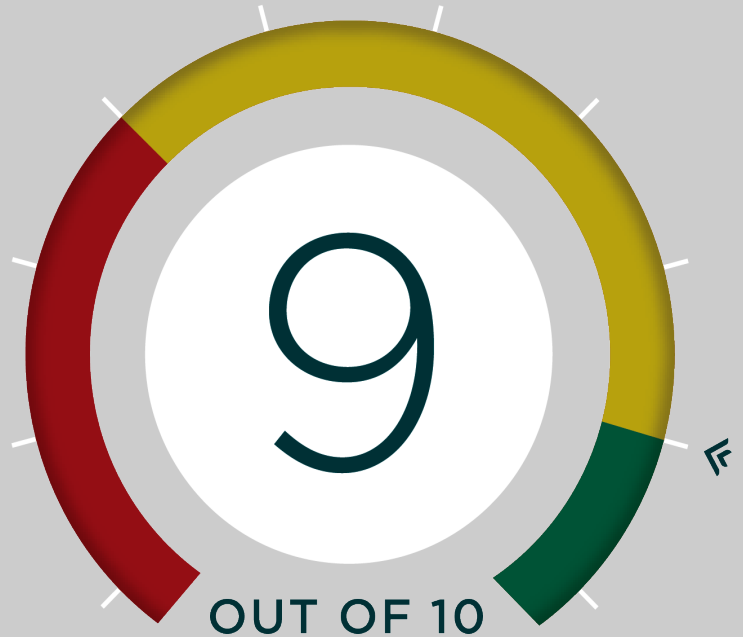




YourWealth™ Score

Terry and Pauline Smith

Johnson Investment Counsel's YourWealth™ Score is a proprietary measure of the health of your wealth management plan. Your Score reflects the completeness and integration of your financial situation, including your investments, cash flow, taxes, insurance, and estate plan. Your Score is a current snapshot highlighting strengths and weaknesses, pointing you and your advisor to the necessary next steps on the journey to achieving your goals. Working together, we will strive to increase YourWealth™ Score over time, with the ultimate goal of providing you and your family confidence and freedom going forward.



0-4:

Your plan has serious deficiencies that need immediate attention

5-8:

Additional changes needed to fully implement plan

9-10:

Excellent; on target to meet goals!

» WHAT YOU ARE DOING WELL

- Beneficiary designations are properly titled
- Combined asset allocation is appropriate
- Estate plan documents are up to date
- Net worth statement updated and complete
- Tax return has been reviewed
- Level of debt is appropriate

» WHAT YOU CAN IMPROVE

- Estate plan documents not on file with JIC

» HOW YOU CAN BOOST YOUR SCORE

- Establish eMoney portal and connect Ameriprise account
- Provide copies of Power of Attorney documents
- Confirm/establish TOD on Ameriprise account