

# Your 2026 Wealth Snapshot

A quick worksheet to clarify goals, spot changes, and review protection

## How to use this worksheet

This short worksheet is meant to help you pause and reflect as you look ahead to 2026. You do not need perfect answers. The purpose is to capture what matters most right now and identify areas that may deserve a closer look.

Many people complete this in 10–15 minutes.

## What do you want your wealth to support in 2026?

Take a moment to focus on the near future.

By the end of 2026, what do you want your money to make possible for you?

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What would feeling financially “on track” look like at that point?

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Are there any major milestones or decisions coming up?  
(Examples: retirement timing, travel, housing changes, family support.)

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## Have your priorities changed?

Financial priorities evolve over time. Check what matters most to you right now.

- ☐ Maintaining lifestyle flexibility
- ☐ Reliable, predictable income
- ☐ Simplifying finances
- ☐ Supporting children or grandchildren
- ☐ Charitable giving
- ☐ Preserving wealth for the future
- ☐ Other: \_\_\_\_\_

Have these priorities shifted in the past few years?

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## What has changed since your last review?

Check any changes that apply.

- ☐ Income or employment change
- ☐ Transition into or within retirement
- ☐ Healthcare or Medicare changes
- ☐ Marriage, divorce, or loss of a spouse
- ☐ New family or caregiving responsibilities
- ☐ Move or plans to relocate
- ☐ Significant purchase or sale
- ☐ Inheritance or major gift
- ☐ Change in comfort with market risk

Which of these should be reflected in your financial plan but may not be?

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## Are your income and protection still aligned?

### Income confidence

Are you confident your current income sources support your priorities?

- ☐ Yes      ☐ No      ☐ Unsure

If no or unsure, why?

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## Insurance quick check

For each item below, note when it was last reviewed.

Life insurance: \_\_\_\_\_

Long-term care insurance: \_\_\_\_\_

Health / Medicare coverage: \_\_\_\_\_

Umbrella or liability coverage: \_\_\_\_\_

Does your coverage still reflect your current assets, income, and family situation?

- ☐ Yes      ☐ No      ☐ Unsure

## What deserves attention next?

Use this space to capture what stood out as you completed this worksheet.

One area I want to review more closely:

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One question I want answered in 2026:

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## Bringing it together?

- + Clear goals and aligned protection create stability. Writing things down helps sharpen priorities and uncover gaps before they become problems.
- + IMA Private Wealth helps clients translate goals into action by aligning investments, insurance, and long-term objectives through an ongoing planning process.
- + If you would like help reviewing this worksheet or incorporating it into your financial plan, IMA Private Wealth is here to support you.

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