

Financial Triage will help you prioritize immediate things that need to be addressed versus more mid-term and long-term issues. By charting everything out, the goal is to replace any feelings of uneasiness with clarity. Sometimes it's just easier to manage when everything is written down.

## Part One: Name and Normalize

Tell your story to your financial planner, a trusted friend, family member or advisor. Tell them how you feel now, what you think this will mean to you, your family, your business, your health, and so on. As you listen to yourself telling your story, you will find that it is normal for someone in your circumstances to feel the way you do. Once you feel like the whole story is out in the open, think back on what was said and try to pick out the individual fears, concerns, and worries and list them here. By listing and naming your concerns, they become less abstract and more manageable .

Fears:

Concerns:

Worries:

## Part Two: Prioritize

Once the worries and concerns are named and listed, you can move on to prioritizing and sorting. List each one in the left column and then determine whether it's an immediate issue, an unlikely scenario, or a possibility to consider.

Fears/Concerns/Worries	Immediate	Possible	Unlikely	Control	Manage

## Part Three: Organize Your Action Plan

Focus your time, attention, and resources to addressing the items on your list that are both immediate threats to your well-being and items that are controllable.

**Note: This is a time when you want to have good professional advice. It is difficult to get a solid reality check on the financial, legal, and relationship implications of actions you may be considering. While this triage exercise may lower your anxiety, you still need to know all the facts and a professional can be of immense help.**

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