

Strategic Wealth Management Issues

A focus on these Strategic Wealth Management Issues will facilitate long-term financial success and this checklist can help you stay on track.....

Wealth Management Issue	Date Addressed	Prioritize Remaining Issues	Date To Be Addressed	Advisor Addressing	Comments/Notes
Investments / Non-Qualified Accounts					
Planning for Retirement / Qualified Accounts					
Life Insurance & Annuities					
Healthcare In Retirement & Long-Term Care					
Home, Auto & Liability Insurance					
Liabilities / Debt					
Business Succession					
Stock Options, Grants, or ESOP					
Durable Power of Attorney					
Gifting to Children, Heirs & Charities					
Appropriate Titling of Assets					
Estate Planning & Selection of Executors					
Charitable Inclinations Upon Passing					