

Financial Checklist

Financial Health

- Financial Assessment: Evaluate current financial situation and set clear financial goals.
- Investment Strategy: Create an investment strategy that aligns with goals and risk tolerance.
- Retirement Planning: Develop a comprehensive retirement plan that factors in lifestyle goals and retirement income needs.
- Tax Efficiency: Review and optimize financial strategies for tax efficiency.
- Emergency Fund: Establish and maintain an emergency fund to provide financial stability.
- Financial Education: Educate your family about personal finance, budgeting, and investing.



YOUR
LOGO
HERE

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YOUR TITLE
YOUR COMPANY
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Estate Planning Health

- Create or Update Your Will: Clearly outline wishes for the distribution of assets, appoint beneficiaries, and designate guardians for minor children.
- Establish a Trust: Create a legal arrangement to protect and manage assets, during incapacity as well as at passing, ensuring they are distributed according to wishes.
- Healthcare & Financial Directives: Establish healthcare & financial directives, to guide medical & financial decisions in case of incapacity.
- Asset Protection: Seek legal advice on protecting your assets from creditors and potential legal challenges.
- Beneficiary Designations: Ensure that all financial accounts and assets have designated beneficiaries.
- Regular Review: Periodically review and update both financial and estate planning strategies.

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Wills | Trusts

Trust Administration | Probate

Schedule A Phone Consultation (405) 212-3945

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