

Checklist: *Income & Investing Years*

(Stable job with family)

Name: _____

SAVINGS	NOTES
Accumulation Planning Discussion	
Maximize Roth or Traditional IRA	
Retirement Plan Funding	
Retirement Plan Review	
Emergency Fund Discussion	
Asset Allocation Discussion	
Pension Review	
Risk Tolerance Discussion	
Retirement Goal Planning	
Roth Conversion	
RISK MANAGEMENT	
Life Insurance Discussion	
Life Insurance Needs Analysis	
Life Insurance Policy Review	
Mortgage Protection Insurance Discussion	
AD&D Insurance Discussion	
Property and Casualty Insurance Review	
Earthquake Insurance Discussion	
Flood Insurance Discussion	
Auto Insurance Review	
Health Insurance Review	
Disability Insurance Discussion	
Disability Insurance Needs Analysis	



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	Umbrella Policy Discussion	
	Homestead Discussion	
	Medical Emergency Evacuation Discussion	
	Home Warranty Discussion	
	Long Term Care Discussion	
	Long Term Care Needs Analysis	
	Long Term Care Policy Review	
	Health Savings Account	
	ESTATE	
	Will Discussion	
	Living Trust Discussion	
	Executor Discussion	
	Letter of Instruction	
	Durable Power of Attorney Discussion	
	Health Care Proxy/Living Will Discussion	
	Review Titling of Assets	
	Annual Beneficiary Review	
	Guardian Discussion	
	Charitable Giving Discussion	
	Estate Planning Attorney Referral	
	Successor Trustee Discussion	
	Corporate Trustee Discussion	
	Gifting Discussion	
	Estate Tax Discussion	
	Special Needs Planning	



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BANKING	
Budget Discussion	
Cash Flow Discussion	
Annual Balance Sheet Review	
Mortgage Review	
Home Equity Loan/LOC Discussion	
Credit Card Review	
Student Loan Review	
Auto Loan Review	
Bank Review	
SOCIAL SECURITY	
Annual Statement Review	
Medicare Discussion	
RMD Planning	
OTHER SUGGESTIONS	
College Cost Calculation	
529 Plan Discussion	
Prepaid Tuition Discussion	
Organ Donation Discussion	
Identity Theft Discussion	
CPA Referral	
Personal Insurance Referral	
Own vs. Lease Automobile	
Debt Reduction Strategies	
Children Money Discussion	
Parent Game Plan Discussion	
Rental Real Estate Discussion	



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	Rental Real Estate Evaluation	
	Retirement Income Education	
	Financial Aid for Your Children	
	Student Loans for Your Children	
	Obtaining Out of State Residency for Your Children	
	Vault	
	Personal Valuables Inventory	



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