

Financial Check List

Please indicate if you would like to discuss any of the following topics

Personal Financial Plan	<input type="checkbox"/>	How To Avoid Probate	<input type="checkbox"/>
I Currently Work With a Financial Advisor	<input type="checkbox"/>	What Is An LLC, Do I Need One	<input type="checkbox"/>
Budgeting	<input type="checkbox"/>	Health Insurance Evaluation	<input type="checkbox"/>
Savings For Emergencies	<input type="checkbox"/>	Long Term Care for Me and My Spouse	<input type="checkbox"/>
Systematic Savings Plans	<input type="checkbox"/>	Long Term Care for My Parents	<input type="checkbox"/>
Education Funding For Children Grandchildren	<input type="checkbox"/>	Estate Planning	<input type="checkbox"/>
I Have a Retirement Plan at Work That I Would Like Explained or Reviewed	<input type="checkbox"/>	Do I Need A Will	<input type="checkbox"/>
Planning For Social Security	<input type="checkbox"/>	Do I Need A Trust	<input type="checkbox"/>
How To Calculate Income Needs At Retirement	<input type="checkbox"/>	Charge Card Debt	<input type="checkbox"/>
Understanding Investments	<input type="checkbox"/>	Retirement Account Analysis	<input type="checkbox"/>
Life Insurance Needs/Review	<input type="checkbox"/>	Brokerage Account Analysis	<input type="checkbox"/>
Will My Family Be Protected If I Die	<input type="checkbox"/>	Insurance Review/Quote	<input type="checkbox"/>
Will My Family Be Protected If I Become Disabled	<input type="checkbox"/>	Tax Strategies	<input type="checkbox"/>
ROTH – IRA	<input type="checkbox"/>	<hr/>	<input type="checkbox"/>
ROTH Conversion	<input type="checkbox"/>	Traditional IRA	<input type="checkbox"/>

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