Financial Check List

Please indicate if you would <u>like to discuss</u> any of the following topics

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

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If you would like us to contact you, please provide:

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