Name ______________________________ Appt. Date ___________________________

Financial Planning Checklist

It is important to understand your full financial picture to develop a financial approach that aligns with all your goals and objectives.

Please take a few moments to review the topics and related questions below. Check off any items that you would like to discuss concerning your financial future. I may have more information on how best to prepare for whatever lies ahead.

Retirement Planning

- ☐ How much do I need to save for retirement?
- ☐ Will I have enough money to last through retirement?
- ☐ How much of my income will be guaranteed in retirement?
- ☐ When is the best time to begin collecting social security?
- ☐ Since I am retiring soon, how should I prepare?
- ☐ How do I manage all of my retirement plans?
- ☐ What should I do with my employer retirement plan?
- ☐ Can I cover the expenses of long-term care?

Education Planning

- ☐ When should I start planning?
- ☐ How much do I need to save for college?
- ☐ What is the best way to save for college?
- ☐ How does my state 529 plan compare to other states' plans?

Financial Basics

- ☐ How can I simplify my financial life?
- ☐ What are ways I can do a better job budgeting?
- ☐ How much should I be saving?
- ☐ How can I reduce my debt?
- ☐ How can I minimize what I pay in taxes?
- ☐ How can I keep my records safe and organized?
- ☐ What are ways I can approach financial discussions with my family?
- ☐ How can I teach my kids about money?
- ☐ How do I help a young adult establish a financial strategy?
- ☐ How do I know if I have too much of my assets in one stock?

Milestones

- ☐ I am getting married. How do we manage our household finances?
- ☐ I am expecting a child. What are ways I can prepare for his/her arrival?
- ☐ I am getting divorced. What happens to my assets?
- ☐ What should I consider when changing jobs?
- ☐ What happens to my 401(k) when changing jobs?
- ☐ What should I consider if I am laid off?
- ☐ How can I protect my family in the event I can no longer work due to injury or illness?
- ☐ How can I protect my family if I were to die prematurely?
- ☐ How can I help my aging parents?
- ☐ What should I do when a loved one dies?
- ☐ What are ways I can help my recent college grad transition into the workforce?

Estate Planning

- ☐ What do I need to know about estate planning?
- ☐ How do I ensure my family will be secure if something happens to me?
- ☐ Can I create and control and inheritance for my children?
- ☐ How do I address potential estate taxes?
- ☐ What information should I share with my beneficiaries, and when?
- ☐ How do I leave assets to minor beneficiaries?
- ☐ What are ways for me to provide to my favorite charity? ■

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2016-1168 | EXP 06/30/2018