FINANCIAL PLAN ROADMAP

PREPARED FOR:

DATE:

CLIENT(S) OBJECTIVES

CLIENT(S) OBJECTIVES AND CONCERNS LISTED IN PRIORITY::

HIGH PRIORITY	MEDIUM PRIORITY	LOW PRIORITY
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ADDITIONAL NOTES:

FINANCIAL PLAN RECOMMENDATIONS

LIST OF OUR FINANCIAL PLAN OBSERVATIONS AND RECOMMENDATIONS

CASH MANAGEMENT

Net worth, cash flow, savings and debt management

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RETIREMENT PLANNING

Income replacement, withdrawals strategies, social security, RMDs, stress testing

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RISK MANAGEMENT
Life insurance, incapacity, disability, property & casualty

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EXPENSE PLANNING
Funding solutions, Education Planning, Cost and inflation impact

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TAX PLANNING
Tax diversification, tax loss harvesting, itemized deduction strategies, Roth conversions

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ESTATE PLANNING
Wealth transfer strategies, trust planning, charitable gifting, beneficiary audit

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ADDITIONAL NOTES:

ACTION PLAN

ACTION ITEMS	ADVISOR COMPLETION DATE	CLIENT(S) COMPLETION DATE
•		

COMPLETED ACTION PLAN ITEMS

ACTION ITEMS	ADVISOR DATE IF COMPLETION	CLIENT(S) DATE OF COMPLETION
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ADDITIONAL NOTES: