The 13 Wealth Management Issues

Research shows there are 13 Wealth Management issues crucial for long term financial success, and this checklist will help ensure all of these planning items are properly addressed over time.

Wealth Management Issue	Date Addressed	Prioritize Remaining Issues	Date To Be Addressed	Advisor Addressing	Comments/Notes
Investments					
Life Insurance & Annuities					
Home, Auto & Liability Insurance					
Liabilities / Debt					
Retirement / IRA Planning					
Long Term Care Planning					
Stock Options					
Business Succession					
Durable Power of Attorney					
Gifting to Children, Heirs & Charities					
Appropriate Titling of Assets					
Estate Planning & Selection of Executors					
Charitable Inclinations Upon Passing					

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