



# Strategic Wealth Management Issues

Research shows that focusing on these Strategic Wealth Management Issues will help facilitate long-term financial success. This checklist can help ensure these items are addressed over time.

Wealth Management Issue	Priority	Date Addressed	Advisor Addressing	Comments/Notes
Investments / Non-Qualified Accounts	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____
Retirement & Income Planning	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____
Life Insurance & Annuities	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____
Healthcare In Retirement & Long-Term Care Planning	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____
Tax Planning & Coordination	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____
Risk Management / P&C Insurance	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____
Liability & Debt Management	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____
Wills, Trusts & Executors	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____
Business Succession	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____
Stock Options, Grants, or ESOP	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____
Durable Power of Attorney	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____
Gifting to Children, Heirs & Charities	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____
Education Funding	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____
Appropriate Titling of Assets	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____
Legacy & Charitable Planning	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	_____	_____	_____