

14 Wealth Management Issues

Customized for:

Issues	Date Discussed	Action Plan	Date Completed
1. Investment Issues			
2. Insurance Issues			
3. Liabilities Issues			
4. Qualified Retirement Plan/IRA Issues			
5. Stock Options Issues			
6. Business Succession Plan Issues			
7. Durable Power of Attorney Issues (who)			
8. Gifting During Life Issues			
9. Charitable Gifting During Life Issues			
10. Titling of Assets Issues			
11. Executor/Trustee Issues			
12. Distribution Plans at Death Issues			
13. Charitable Inclinations at Death Issues			
14. College Education Planning			