

13 Wealth Management Issues Document

Name: _____

	<i>Issue</i>	<i>Date Discussed</i>	<i>Action Plan</i>	<i>Date Accomplished</i>
1	<i>Investment Issues</i>			
2	<i>Insurance Issues</i>			
3	<i>Liabilities Issues</i>			
4	<i>Qualified Retirement Plan/IRA Issues</i>			
5	<i>Stock Option Issues</i>			
6	<i>Business Succession Plan Issues</i>			
7	<i>Durable Power of Attorney Issues</i>			
8	<i>Gifting to Children/Descendent Issues</i>			
9	<i>Charitable Gifting During Life Issues</i>			
10	<i>Titling of Assets Issues</i>			
11	<i>Executor/Trustee Issues</i>			
12	<i>Distribution of Wealth at Death Issues</i>			
13	<i>Charitable Inclinations at Death Issues</i>			

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