

# FINANCIAL PLANNING CHART

Name: \_\_\_\_\_

Date: \_\_\_\_ / \_\_\_\_ / 20\_\_\_\_

Cash Management	Education	Investments	Retirement	Income Sources Retirement	Insurance (Ted Kadison)	Elder Care	Estate Planning
Liquid Reserves \$ _____	Illustration of College Need Saved \$ _____ Need \$ _____	Morningstar Review	401k Value & Input EE % Input _____ ER Match _____	Social Security \$ _____ \$ _____ At Age _____	Liability Basic Covg & Umbrella Policy P & C Last Reviewed Date ____ / ____ / ____ Agent _____	Document Organization	Estate Last Revised Date ____ / ____ / ____
Credit Card Debt Rate % _____ Owed \$ _____ MO PMT \$ _____	Current Assets UGMA \$ _____ 529 \$ _____	Asset Allocation Stocks % _____ Bonds % _____ Cash % _____ Foreign % _____	IRA's Contributions \$ _____	Pensions \$ _____ At Age _____	Life & Insurance Amount \$ _____ Premium \$ _____	Medicare Supplement Insurance	Will/POA/Living Will Date ____ / ____ / ____ Executor _____ Trustee _____
Home Mortgage Details MV _____ Mortgage _____ Taxes _____ Paid _____	Account Ownership UGMA/529 _____ _____	Performance Review Last Yr % _____	Pensions \$ _____ At Age _____	Variable Annuities Monthly Payout \$ _____	Disability Income MO Benefit \$ _____ Premium \$ _____	Long Term Care MO Benefit \$ _____ Premium \$ _____ Carrier _____	Credit Shelter Trust
Consolidated Statements-Paperless	Monthly Input \$ _____	Monthly or Annual Input \$ _____	Retirement Income Plan	Real Estate Income 5%-7%	Major Medical Retirement Benefit? Yes/No	Elder Care for Parents	Life Insurance Trust & Ownership