NOLANBAKER
HERE FOR YOUR ENTIRE RETIREMENT.

YOUR PERSONAL CFO CHECKLIST

Name:______________________ **Start Date:** ______________

Action Item:

Better Manage Your Money:	**Note:**	**Completion Date:**
1. Financial Inventory	________	________
2. Cash flow management and forecast	________	________
3. Debt elimination plan	________	________
4. Investment Policy Statement	________	________
5. Critical warning and circuit breaker system	________	________
6. Add to buy in list	________	________
7. Reliable versus variable retirement income	________	________
8. Required Minimum Distributions	________	________
9. Social Security Income Analysis	________	________
10. Pension Max	________	________
11. Tax review completed with an accountant	________	________
12. Plan Confidence System	________	________
13. “Get Connected”	________	________

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Protecting Your Assets:

1. Home and auto insurance reviewed ________ ________
2. Medicare enrollment discussed ________ ________
3. Supplemental Medicare health insurance reviewed ________ ________
4. Long term care plan reviewed ________ ________
5. Review loss of income from a premature death ________ ________

Protecting Your Estate:

1. Review legal documents by an attorney ________ ________
2. Complete beneficiary checklist ________ ________
3. Review the funding of assets if a trust was set up ________ ________
4. Review if POD or TOD registration should be used ________ ________
5. Review how assets should be owned and titled ________ ________
6. Review a plan to maximize assets to heirs ________ ________
7. Life insurance review ________ ________