



Your Personal CFO Checklist

Name: _____

Start Date: _____

Action Item:

Note:

Completion Date:

Better Manage Your Money:

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

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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

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Additional Notes:

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