

PATHWISE FINANCIAL PLANNING

10 CHECKPOINTS

- 1. FINANCIAL PROJECTIONS**
- 2. RETIREMENT ASSETS**
- 3. NON-QUALIFIED ASSETS**
- 4. OTHER ASSETS**
- 5. BUSINESS MATTERS**
- 6. SOCIAL SECURITY & MEDICARE**
- 7. INSURANCE**
- 8. LEGACY PLANNING**
- 9. TAX RETURNS**
- 10. ESTATE/LEGAL DOCUMENTS**