AK Financial Group
Financial Planning Checklist

Name: ______________________________ Date: __________ Email: ______________________________

- ❑ **REVIEW OF PERSONAL/FINANCIAL CHANGES SINCE LAST MEETING**
- ❑ **REVIEW OF CURRENT POSITION RELATIVE TO ACHEVING GOALS**
- ❑ **PERSONAL FINANCIAL STATEMENTS**
  - Balance Sheet
  - Cash Flow/Budget
  - Mortgage
  - Outside Accounts
- ❑ **RISK MANAGEMENT**
  - Health Insurance/Long Term Care
  - Disability Insurance
  - Life Insurance
  - Auto/Home Owners/Earthquake Insurance
  - Umbrella Policy
- ❑ **INCOME TAX PLANNING**
  - CPA
  - Tax Returns
- ❑ **MARKET OVERVIEW**
- ❑ **RETIREMENT & EDUCATION PLANNING**
  - Employer Plans
- ❑ **IRA/RMD's**
  - Non-Qualified
  - 529 Plans
- ❑ **ESTATE PLANNING**
  - Wills & Trusts
  - Gifting
  - Estate Taxes
  - Lawyer
- ❑ **QUESTIONS OR CONCERNS**
- ❑ **HOW CAN WE EXCEED YOUR EXPECTATIONS?**

Next Meeting Scheduled: __________ New Worth: __________ Liquid Net Worth: __________ Annual Income: __________

AK Financial Group Representative Network—service and support you can rely on. **To learn more, contact us at 949-788-7700 or visit us at www.akfinancialgroup.com.**