

Senior Client Review Process

Reviewing your accounts and retirement spending plan is very important, but it is only one part of our financial planning process. We want to make sure we are prepared for you to live a long healthy life but also be prepared in the event of a long-term health care need or even an early passing. As part of our planning process every 2 years after your 70th birthday we will review and update the following:

- Money Concepts' - Senior Investor Questionnaire
- Review your annual Required Minimum Distributions
- Inventory all accounts held inside and outside of Money Concepts
- Inventory all personal assets and property
- Inventory all Life and Long-Term Care insurance policies
- Review the beneficiary arrangements on all insurance policies, qualified accounts and annuities
- Review the TOD arrangements on all non-qualified accounts
- Review Estate documents
 - Will
 - Power of Attorney
 - Healthcare Directives

As part of this process, we have found that many of our clients would like to include their children or other trusted individuals in these meetings. Please let us know the names and contact details of individuals you would like us to invite to our next meeting.

Name: _____ Phone #: _____

Relationship: _____ Email address: _____

Name: _____ Phone #: _____

Relationship: _____ Email address: _____

Name: _____ Phone #: _____

Relationship: _____ Email address: _____