

2017–Family Planning Checklist:

01-01-2017

Date	Item
PENDING	Fund 2017 IRA 2017- \$5,500.00
REVIEW	Review 2017 Tax/Income/Investment Rule Changes
REVIEW	Asset List Summary Please forward information on any other items that you would like us to add or update on your eMoney Asset Summary going forward.
REVIEW	Risk Management Prepare a homeowners inventory or video of your personal possessions. Keep records in e-Money.
REVIEW	Savings Establish automatic monthly deposits to your investment accounts as cash-flow allows. Note: Goal here is to balance out your Pre-tax (401k, 403b, IRAs) to Post-tax portfolio assets.
REVIEW	Legal Documents Review and where necessary update legal documents (Durable Powers of Attorney, Medical Powers of Attorney, Living Wills, and Healthcare Proxy) with (Attorney). Formalize estate plan.
REVIEW	eMoney Account Aggregation Software Please work with us to begin using this software in order to have a discussion on your overall portfolio. This will allow us to make recommendations with a full real time view of your financial holdings at various financial service firms.
2017	Review eMoney Retirement Plan Note: Based on our conversation David Smyth will build out your projected retirement plan with the goal of pre-tax income in retirement of (\$___K).