LEAHY WEALTH MANAGEMENT GROUP

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Review Meeting Checklist

This checklist is for our more substantial reviews and is often not needed for regular periodic reviews.

Comprehensive plan reviews usually take about an hour. Our time is spent discussing how recent changes have impacted your plan, and answering questions you may have. The objective of the meeting is to assure that **we both remain well informed and that you remain on target**.

Our tech platform allows us to conveniently have this meeting online in a secure manner, but we're also available for in-person meetings.

Please review the items on the below checklist for changes. Please don't include changes from the accounts we manage or information listed (aggregated) for you on our wealth platform. Please use the secure document sharing portal or your private vault on the wealth platform to share documents beforehand.

Investments

- ☐ Investment Accounts, Retirement Plans (401k, 403b, TSP, etc.), IRA Accounts
- ☐ Other Investments (Property, Business Interests, Annuities, 529's, etc.)

Income and Budget

- ☐ Annual income (changes)
- ☐ Pension Benefit Summary, Social Security, Stock Options, Vesting Schedules
- ☐ Average Monthly / Annual Budget (changes)

Debt

- ☐ Mortgages, Home Equity Loans, Other New Debts

Asset Protection / Insurance

- ☐ Life Insurance Policies - Both Term and Permanent
- ☐ Disability, Liability, Long-Term Care, Company / Employer Benefits Summary

Estate Planning

- ☐ Wills, Trusts, Power of Attorney, Health Care Directives – date of last update.
- ☐ Future Inheritance or Liabilities.
- ☐ All beneficiary data on trusts, IRA's, etc. Confirm they are up to date and accurate.