



FINANCIAL ASSESSMENT

*Get started building your
wealth dream team.*

Financial Status Checklist: Core

- INVESTMENT ACCOUNT SETUP
- CASH FLOW AND SAVINGS PLAN ESTABLISHED
- 6-9 MONTHS OF EXPENSES SAVED MINIMUM
- 1 MONTH OF CASH AND PRECIOUS METALS SAVED IN A SAFE
- CASH FLOW DEBT REPAYMENT STRATEGY BEING APPLIED
- PROPER INSURANCE COVERAGE TO PROTECT AGAINST ANY UNFORESEEN CATASTROPHES
- ESTATE PLAN UPDATED
- CORPORATION IN PLACE AND ANNUAL OWNER MEETING (IF BUSINESS OWNER)
- HAVE ALL FINANCIAL PROFESSIONALS ON SAME MEETING/CALL
- WRITTEN PERSONAL INVESTMENT AND INSURANCE PHILOSOPHY

Financial Status Checklist:

Security & Protection

- UNINSURED/UNDERINSURED ON UMBRELLA POLICY
- ASSET PROTECTION TRUST IN FORCE AND UPDATED
- STATEMENT OF PURPOSE ADDED TO ESTATE PLAN
- WAR CHEST/OPPORTUNITY FUND OF SIX MONTH EXPENSES FOR BUSINESSES
- PERCENT OF INCOME GOING THROUGH CASH FLOW BANKING SYSTEM
- TRAILING STOP-LOSS OR COLLATERAL ADDED TO INVESTMENTS
- ALL ACCUMULATION INVESTMENTS TRANSFERRED TO CASH FLOW INVESTMENTS
- STRESS-FREE INVESTMENTS ONLY THAT DO NOT CREATE FEELINGS OF SCARCITY
- BOARD OF DIRECTORS FOR FAMILY TRUST

Financial Status Checklist:

Growth

- INVESTOR RISK TOLERANCE IDENTIFIED ☒☒
- FULL UNDERSTANDING OF ALL YOUR ☒ INVESTMENTS
- KNOWLEDGE OF HOW INVESTMENTS BENEFIT YOU NOW AND IN THE FUTURE
- CLARITY AND CONFIDENCE IN FINANCIAL DIRECTION
- ECONOMIC INDEPENDENCE (INVESTMENTS COVER EXPENSES)
- FREEDOM FUND (LUMP SUM OF MONEY AT MINIMAL RISK TO COVER EXPENSES)
- GOOD HEALTH AND ENERGY SO YOU CAN ENJOY YOUR CURRENT LIFE
- SYSTEM IMPLEMENTED TO INVEST IN YOURSELF
- CONFIDENCE, CLARITY AND CONTROL BECAUSE YOU'RE LIVING A LIFE YOU LOVE
- FULLY INTEGRATED AND FUNCTIONAL FINANCIAL ☒ TEAM

Financial Status Checklist: *Your Financial Network*

ADVISOR PROACTIVE
OR REACTIVE?

RESULTS OF LAST
MEETING

- MENTOR/LIFE COACH
- BUSINESS ATTORNEY
- ESTATE PLANNING ATTORNEY
- ACCOUNTANT
- PRIVATE BANKER
- FINANCIAL PLANNER
- INVESTMENT ADVISOR
- MORTGAGE BROKER
- LIFE INSURANCE AGENT
- PROPERTY & CASUALTY AGENT
- REAL ESTATE ADVISOR
- BOOK KEEPER