

Financial Planning Checklist

- Education
- Living Expenses
- Long Term Elder Care

- Wills
- Power of Attorney
- Beneficiaries

- Health
- Disability
- Critical Illness
- Life



- Income
- Mortgage
- Debt

- Taxes up-to-date
- Tax minimization

- Short term goals
- Medium term goals
- Long term goals
- Retirement

This checklist is designed to look at your financial picture so you can achieve your financial goals.

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Liyong Dong



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