Wealth Management Issues Document

First Name

Last Name

Phone Number

Email

Address

Wealth Management Issue	Date Discussed	Actions Planned / Taken
Investment Planning		
Risk Management & Insurance Planning		
Banking & Credit Management		
Retirement Planning		
Executive Compensation		
Business Succession Planning		
Planning for Incapacity		
Education & Family Support		
Charitable Giving		
Titling & Beneficiary Designations		
Executor & Trustee Selection		
Distribution of Estate		
Tax Planning		