KING wealth planning, inc.

Retirement is a Journey. Let us be your Guide.

WealthCHECK

Financial Review Preparation Guide

This guide is designed to assist you in preparing for your annual review meeting (WealthCHECK). Each section includes reminders of important items that should be reviewed each year.

Please complete this form to the best of your ability and please **return to us no later than one week before your scheduled annual review** so that we can prepare for your meeting. Thank you for helping us to become more thorough and more efficient with YOUR annual WealthCHECK.

Should you have any questions, do not hesitate to contact us:

shannon@kingwealth.com
flor@kingwealth.com
408.879.0789
1800.ADVISE (592.3847)
Client Resources

Thank you!

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Financial Review Preparation Guide

For KWP Use ONLY

Clients: ______________________

Last WealthCHECK: ______________

Scheduled WealthCHECK: __________

Last Tax Return: ______________________________(year)

Trusted Contact(s): ______________________________

TC's Email: ______________________________

KWP Action Items: ______________________________

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Top Priorities for Meeting

1. ______________________________
2. ______________________________
3. ______________________________

Personal Planning Website (PPW)

https://www.kingwealth.com/clientresources

Click on "Access My Personal Website" button.

Review your assets and liabilities and note any changes that need to be made:

1. ______________________________
2. ______________________________
3. ______________________________

WealthCHECK

Family

Y N

- [ ] [ ] Have you had or do you expect any changes in family? (birth, marriage, divorce, death)
- [ ] [ ] Any changes or expected changes in dependents?
- [ ] [ ] Do you make or want to consider making gifts to family members or other individuals? If so, list names and purpose:

____

____

Details/Questions/Notes:

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Goals

Y N

- [ ] [ ] Have any of your goals changed in the past year?
- [ ] [ ] Are you planning on making any significant purchases?
- [ ] [ ] Are you planning to renovate or improve your home?
- [ ] [ ] Do you anticipate any significant lifestyle changes in the next 5-10 years?
- [ ] [ ] Are you planning to move, buy or sell a home? If so, state timeframe and purpose:
- [ ] [ ] Do you feel stressed about any aspect of finances? (economy, future, debts, income, etc.?)
- [ ] [ ] Do you have a bucket list?

Details/Questions/Notes:

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WealthCHECK

Health

Y N

☐ ☐ Have there been any changes in your health?

☐ ☐ Are you concerned about the health of anyone in your family?

How do you stay active?

____

____

Details/Questions/Notes:

____

____

Work

Y N

☐ ☐ Have you changed your job or have concerns about the security of your career?

☐ ☐ Did your total compensation or benefits change?

☐ ☐ Are you taking full advantage of your company retirement plans and benefits?

Retirement

Y N

☐ ☐ Any changes to your retirement plans or goals?

☐ ☐ Do you anticipate needing to borrow or withdraw funds from your retirement accounts this year?

☐ ☐ Would you like to increase the amount you are saving for retirement?

☐ ☐ Have you applied or plan to apply for Social Security benefits?

☐ ☐ Do you need help understanding Required Minimum Distribution (RMD) rules for your own or inherited IRAs?

Details/Questions/Notes:

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Estate

Y N

- ☐ ☐ Do you need to draft, review or change any estate planning documents? (wills, trust, powers of attorney, health care directives, etc.)
- ☐ ☐ Have you drafted or revised your Living Trust? (If so, please upload a copy to your PPW)
- ☐ ☐ Do you need to update your beneficiary designations?
- ☐ ☐ Do you need to update or add Trusted Contacts on your accounts with us?

Details/Questions/Notes:

____

____

Investments

Y N

- ☐ ☐ Do you have concerns about your investment portfolio?
- ☐ ☐ Has anything changed to affect your investment outlook?
- ☐ ☐ Is your cash flow adequate to meet your living expenses?
- ☐ ☐ Could you get by for six months or more without dipping into your retirement or other long-term accounts?

Details/Questions/Notes:

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Liabilities

Y N

- ☐ ☐ Do you worry about your debts?
- ☐ ☐ Have you paid off, restructured or refinanced a mortgage or any debts?

Details/Questions/Notes:

____

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Taxes

Y N

☐ ☐ Are you concerned with the level of taxes you pay?

☐ ☐ Did you change tax advisors?______________________________(name/phone)

☐ ☐ Are you planning to sell any appreciated assets?

☐ ☐ Are you interested in charitable giving? If so, name the charities and plans. (Upload latest tax return to your PPW vault)

Details/Questions/Notes:

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____

Insurance

Y N

☐ ☐ Did you acquire, change, or stop any health, life, disability, Medicare, long-term care, or other health insurance coverage?

Details/Questions/Notes:

____

____

Other

Notes:

____

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Please return this completed form to us no later than one week before your scheduled annual review meeting. Email, mail or upload to your PPW vault/shared documents.