RESET FORM

13 Wealth Management Issues

Client Name

	Wealth Management Issue	Priority	Action Planned/Taken	Date Discussed/ Reviewed
1)	Investment Issues			
2)	Risk Management & Insurance Planning			
3)	Banking & Credit Management			
4)	Retirement Planning			
5)	Executive Compensation			
6)	Business Succession Planning			
7)	Planning for Incapacity			
8)	Education & Family Support			
9)	Charitable Giving			
10)	Titling & Beneficiary Designations			
11)	Executor & Trustee Selection			
12)	Distribution of Estate			
13)	Tax Planning			

Next review date

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KEILER/LYONS
FINANCIAL MANAGEMENT TEAM

Advisors with D.A. Davidson & Co. member SIPC

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WEALTH MANAGEMENT