Senior Financial Services Needs Checklist

Personal Information

Client Name:

Date:

Advisor Name:

Income & Expenses

- [ ] Pension Income Assessed
- [ ] Social Security Benefits Reviewed
- [ ] Other Income Sources Identified
- [ ] Monthly Expenses Reviewed

Estate Planning

- [ ] Will Updated
- [ ] Power of Attorney in Place
- [ ] Trusts Reviewed
- [ ] Beneficiaries Updated

Insurance

- [ ] Health Insurance Coverage Reviewed
- [ ] Long-Term Care Insurance Considered
- [ ] Life Insurance Needs Evaluated
- [ ] Other Insurance Needs Assigned

Investments

- [ ] Risk Tolerance Assessed
- [ ] Asset Allocation Reviewed
- [ ] Withdrawal Plan Established

Healthcare Needs

- [ ] Medicare Options Evaluated
- [ ] Supplemental Insurance Reviewed
- [ ] Advance Directives Discussed

Other Needs / Notes