

Integrated Planner©

Name: _____

Date: _____

Notes/Action Pts:

The diagram is a large diamond shape with a central circle. The diamond is divided into four quadrants by a horizontal and a vertical line. The central circle is also divided into two halves by a vertical line. The sections are as follows:

- Top-Left Quadrant:** 5. Cash Flow Management/ Taxes**
 - Tracking cash flow
 - Use budget
 - Taxes minimized
 - Debt optimized
 - Charity
 - Satisfied
- Top-Right Quadrant:** 6. Insurance**
 - Life/dependents
 - Life/estate taxes
 - Long-term Care
 - Disability
 - Umbrella
 - Auto
 - Home
 - Health
 - Business
 - Satisfied
- Center Circle:** 1. Identity/Purpose*
 - Eulogy/epitaph?
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 -
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- Bottom-Left Quadrant:** 3. Profession*
 - Meaningful
 - Needs met
 - Skill growth
 - Satisfied
- Bottom-Right Quadrant:** 4. Fitness*
 - Healthy diet
 - Reg exercise
 - Proper rest
 - Doc checkup
 - Hobbies
 - Satisfied
- Bottom-Left Triangle (Pointing Down):** 7. Investments***
 - Know risk tolerance
 - Portfolio matches goals/risk tolerance
 - Diversified portfolio
 - Track performance
 - Understand costs
 - Satisfied
- Bottom-Right Triangle (Pointing Down):** 8. Estate Planning**
 - Updated will
 - Notes for survivors
 - Trust/s
 - Guardian
 - Durable Attorney
 - Understand taxes
 - "If I die today" file
 - Titling/Beneficiaries
 - Satisfied
- Center Triangle (Pointing Up):** 2. Relationships*
 - Family**
 -
 -
 -
 -
 - Community**
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 -
 -
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*Check the box if "yes." These topics will be addressed by your advisor and may include a meeting fee.

**Check the box if "yes." These topics will be addressed by your lead advisor.

***These topics will include a special advisor either in-house or external.

****Investments include an annual, asset-based fee charged quarterly.

<Notes/action points on back>

1. Identity/Purpose

2. Relationships

3. Profession

4. Fitness

5. Cash flow management/Taxes

6. Insurance

7. Investments

8. Estate planning