

ANNUAL LIFE CHANGE CHECKLIST

THE FOLLOWING CHANGES MAY SIGNAL THE NEED OR OPPORTUNITY FOR CHANGES OR ADJUSTMENTS TO YOUR FINANCIAL STRATEGY.

Please simply put a check-mark next to any changes that apply, then return to me. I'll go over these, take a closer look at your strategy, and contact you if I feel we should consider alterations.

Change in employment? (job or title)

Additions to your family?

Change in marital status?

Losses within your family?

Health changes?

New future goals?

Financial changes? (inheritance, lottery, etc.)

Change in address?

New property or major purchase?

Change in phone number?

New ventures?

Change in email address?

Other changes?