Wander Financial Services

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Sample Client's PlanMap - Action List

Jan 01, 2016

	Action ID	TargetDate	Assigned	Recomendation/Action	Notes	Checklist
☐	#1	Jul 01, 2015	Robert Wander	Prepare Financial Plan for transition to retirement		
☐	#2	Jul 18, 2015	Sample Client	Complete Risk Profile Questionnaire for investment of excess cash		
☐	#3	Jul 18, 2015	Robert Wander	Review options for Long-Term Care insurance		
☐	#4	Jul 18, 2015	Sample Client	Gather recent statements for retirement accounts in order to consolidate them		
☐	#5	Aug 01, 2015	Robert Wander	Provide access to MyCFO, an online portal to view and manage your financial life