**Monthly Mailbox Money Guaranteed?**

His Soc Sec $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Her Soc Sec $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Pension $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

PIRA $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Investments \_\_\_% $\_\_\_\_\_\_\_\_\_\_\_\_

**Total $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Position**

Soc Sec Stmts \_\_\_\_\_\_\_\_

Pension Projections \_\_\_\_\_\_\_\_

401K & IRA Stmts \_\_\_\_\_\_\_\_

Life Insurance Stmts \_\_\_\_\_\_\_\_

Investment & Mfd Stmts \_\_\_\_\_\_\_\_

Brokerage Statements \_\_\_\_\_\_\_\_

Bank Account Stmts \_\_\_\_\_\_\_\_

Trusts & Wills \_\_\_\_\_\_\_\_

Beneficiaries & EduCare \_\_\_\_\_\_\_\_

POAHC & HCD \_\_\_\_\_\_\_\_

Mortgage & CC Stmts \_\_\_\_\_\_\_\_

**Projection**

Cost of living \_\_\_\_\_\_\_\_

HealthCare COL \_\_\_\_\_\_\_\_

Income taxes \_\_\_\_\_\_\_\_

Future values \_\_\_\_\_\_\_\_

Value of estate \_\_\_\_\_\_\_\_

**Protect**

From inflation \_\_\_\_\_\_\_\_

From bear market \_\_\_\_\_\_\_\_

From investment fees \_\_\_\_\_\_\_\_

From income taxes \_\_\_\_\_\_\_\_

From capital gains tax \_\_\_\_\_\_\_\_

From opportunity costs \_\_\_\_\_\_\_\_

From healthcare costs \_\_\_\_\_\_\_\_

**Payoff**

Soc Sec when/how much \_\_\_\_\_\_\_\_

Pension decisions \_\_\_\_\_\_\_\_

Monthly Mailbox Money® \_\_\_\_\_\_\_\_

**Perpetuate**

Bene deed(s) \_\_\_\_\_\_\_\_

Bene TOD \_\_\_\_\_\_\_\_

Probate protection \_\_\_\_\_\_\_\_

Estate Tax Eliminated \_\_\_\_\_\_\_\_

HealthCare financed \_\_\_\_\_\_\_\_

Living Trust(s) \_\_\_\_\_\_\_\_

Pour-over will(s) \_\_\_\_\_\_\_\_

POAHC(s) \_\_\_\_\_\_\_\_

HealthCare Directive (s) \_\_\_\_\_\_\_\_

TrueWealth systematized \_\_\_\_\_\_\_\_