

Investment Accounts
Asset Allocation
Risk Management
Rate of Return
Benchmark Comparison
Tax Efficiency

Life Goals
Family Money History
All Assets
Passion, Purpose, Dreams, Desires
Money Scripts
Values, Intentions
Financial Biases
Life Stages
Economic Cycles
Giving Opportunities
Family Assistance
Social Security Maximization
Communication
Life Balance
Longevity Issues
Financial Boundaries
Spending Plans
Financial Implications, Consequences
Advocacy, Education
Debt Management
Emergency/Opportunity Account
Financial Education
Distribution Strategies
Housing/Mortgage
Estate Planning
Tax Planning