Our primary focus is not simply on the dollars and cents, but on your life – your business, family and future.

We understand that you are busy doing what you do best in business and sometimes there is just not enough time to give your full attention to goals related to your family's interests and personal retirement strategies. We've compiled this check list based on our 10 Wealth Stewardship areas.

PLANNING CHECKLIST

Cash Flow Planning

- ☐ Do you have a positive margin in your monthly spending or need help on how to simplify your budget? Leveraging technology to automate the most important steps to consistently reach your financial goals?

Retirement Planning

- ☐ Are you maximizing the options available to save towards retirement?

Investment Counsel

- ☐ How comfortable are you with the risk and return profile of your portfolio and the ability to handle inflation?

Contingency Planning

- ☐ Is your family protected if you are hit by a meteor?

Debt Management

- ☐ Given recent tax changes, is leasing or buying company vehicles more cost-effective?

Education Planning

- ☐ Do you have a plan for supporting your kids or grandkids with educational expenses?

Estate & Legacy Planning

- ☐ Have you recorded your wishes recently through complete estate review?

Business Continuation & Succession

- ☐ Is there a key-employee or business partner whose demise would hinder your business?

Generosity & Giving

- ☐ Are your charitable gifts taking full advantage of available tax deductions?

Special Situations

- ☐ Are your parents in a position that will eventually require you to care for them?

Call us today at **817.865.1811** or visit us online at **www.boxfinancial.com**