ENGAGEMENT ESTIMATOR

NAME:	MM/DD/YY	EST. TIME
GOAL SETTING: Initial consultation and identify key strengths and weaknesses		
CASH FLOW PLANNING: review all sources and uses of cash flow		
Plan for major expenditures		
Plan for periodic investments based on surplus		
Plan for periodic liquidations based on deficit		
Plan for change in cash flow over lifetime events		
RETIREMENT PLANNING: review existing accounts and company benefits		
Assist in goal setting		
Run Capital Needs Analysis		
Review Social Security claiming strategies		
Develop a Spending Policy for investment withdrawals		
Advice on setting up retirement plans/contribution amounts		
INVESTMENT PLANNING: review all investment accounts		
Review all investment accounts and analyze portfolio		
Determine cost basis for all taxable investments		
Develop Investment Policy (asset allocation) to attain client goals		
For Investment Management Clients only - design tax efficient portfolio		
Determine appropriate Investment Policy for each account		
Identify possible ROTH IRA investment strategies		
TAX PLANNING: review most recent tax return		
Identify taxable income and effective tax rate		
Explore strategies to reduces taxes		
Coordinate with CPA		
Plan cash flow for quarterly tax payments		
EDUCATIONAL PLANNING: review current savings to date		
Detemine the amount to save to achieve goals for each child & methods to save		
DEBT MANAGEMENT AND REFINANCE OPTIONS: review current vs. goals		
Develop strategies to assist in reaching goals		
RISK MANAGEMENT PLANNING: review current insurance policies		
For cash value policies, review asset allocation		
Secure "in-force" ledgers for existing policies		
Review beneficiary and ownership		
Review need for Long Term Care Insurance		
COMPANY BENEFIT REVIEW: recommend on max employee opportunities		
POST RETIREMENT PLANNING: determine distribution schedule		
Determine methods of producing cash flow		
BASIC ESTATE PLANNING: review goals and value		
Review current estate plans and documents		
Develop strategies to assist in reaching goals		
Coordinate with Attorney		
Review titling of assets and current beneficiaries on record at Custodians/Insurance		
CLIENT DATA REVIEW AND STRATEGY MEETING(S)		
Other Financial Planning Areas: ______________________		
FINAL PLAN RECOMMENDATIONS MEETING(S)		
TOTAL TIME SUGGESTED TO PREPARE FINANCIAL PLANNING STRATEGIES		0
Estimated Financial Plan Fee at $xxx/hour		
Assumes online access to investment accounts during planning period		
Additional fees if manual entry is needed by LFG staff		