DeFilippis®
Financial Group
Wealth Management & Tax

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Client Review Checklist

Client's Name:		Date:	
Client's Daytime Phone:		Client's Evening Phone:	

Some of the events which occur in our lives affect our financial goals/plans. Please put a checkmark by any of the items below which have changed or occurred since our last review:

	Birth/Adoption of a child		Purchased or sold real estate interest in a business
	Interested in funding a child's or grandchild's education		Received a large sum of money
	Learned that careful asset positioning can have a sizeable impact on financial aid amounts/eligibility for my child's college costs		Became concerned about estate: cost/taxes
			Considered changing insurance beneficiaries
			Marriage or Divorce
	Became concerned about funding of long-term care for self or a relative		Became interested in tax minimization strategies
			Considered a sizeable gift or gifting program
	Employment change		Became interested in a charitable bequest
	Significant change in employee benefits		Became concerned about supplementing Social Security Income
	Income change		
	Death, long-term illness or disability of a close relative		Wanted to obtain a current estimate of potential Social Security benefits
	Retirement (actual or to occur soon)		
	Acquired or sold an ownership in:		

Revised: 5/13/19