

# CFI

Composite  
Finance  
Inc.



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FMA, CIM, CFP

## Financial Check-List

<i>Do you have the following ?</i>	YES	NO
Personal/family financial statements	<input type="checkbox"/>	<input type="checkbox"/>
Financial strategy to achieve goals	<input type="checkbox"/>	<input type="checkbox"/>
Tax reduction strategy	<input type="checkbox"/>	<input type="checkbox"/>
Optimized custom-designed portfolio	<input type="checkbox"/>	<input type="checkbox"/>
Investment Policy Statement	<input type="checkbox"/>	<input type="checkbox"/>
Investment plan	<input type="checkbox"/>	<input type="checkbox"/>
Retirement plan	<input type="checkbox"/>	<input type="checkbox"/>
Risk reduction strategy	<input type="checkbox"/>	<input type="checkbox"/>
Executor & Will plan	<input type="checkbox"/>	<input type="checkbox"/>
Estate plan	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan	<input type="checkbox"/>	<input type="checkbox"/>

*See a qualified advisor about any deficiencies*

**Wealth Management for the 21st Century**

[www.compositefinance.com](http://www.compositefinance.com)

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