



FAMILY TREE

Children / Spouses (Names and Ages)

Grandchildren (Names and Ages)

FAMILY GIFTING

TOP PRIORITIES

EST. ESTATE VALUE

\$

PILLAR ONE
CONTROL

Who holds decision authority over your wealth?

INVESTMENTS & ASSETS

OWNER / TYPE	CUSTODIAN	AMOUNT
Primary Home		
Joint / Pref. Savings		
Joint / Brokerage		
IRA(s)		
Other		
Portfolio Distribution		%

NOTES

PILLAR TWO
CONTINUITY

Does it hold, or does it fragment?

INCOME PLANNING

SOURCE	AMT / FREQ	STARTS-ENDS
Retirement Income Goal		

PERSONAL INSURANCE

TYPE	ON-FILE	LAST REVIEW
Life Ins.		
LTC Ins.		
Health Ins.		

NOTES

PILLAR THREE
ALIGNMENT

Reinforcing each other, or quietly in conflict?

TAX PLANNING

CATEGORY	2026 EST.	2025
AGI		
Marginal Tax Rate		
Dividends		
Interest		
Capital Gains		
Total Taxes Paid		
Medicare Threshold		

RMD Strategy	
Roth Conv. Strategy	

OUTSIDE ADVISORS

CPA / Last Coordinated	
Attorney / Last Coordinated	

NOTES

PILLAR FOUR
STRUCTURE

Is your wealth built to transfer accordingly?

ESTATE / TRUST PLANNING

DOCUMENTS	ON-FILE	LAST REVIEW
Trust		
Living Will		
Pour Over Will		
POA(s)		
HIPAA		
Social / Digital Assets		

LEGAL & PROPERTY PROTECTION

TYPE	ON-FILE	LAST REVIEW
Property / Casualty		
Umbrella / Liability		

NOTES

PILLAR FIVE
DEPENDENCE

Where does your plan rely on aspects outside of structure?

KEY-PERSON DEPENDENCY

Relies on one person present? ☐ Yes ☐ No

CONCENTRATED POSITION

Asset / Stock
 % of Net Worth

PLANNING ASSUMPTIONS

This plan currently assumes:

BUSINESS OWNERSHIP (if applicable)

Entity Name
 Ownership %

UPCOMING LIQUIDITY EVENT

Event (sale, inheritance, lump sum)
 Expected Timing

NOTES

