fpPATHFINDER

Popular Checklists & Flowcharts

With nearly a hundred resources to choose from (and more on the way), members often ask which resources are most popular. While certain resources gain popularity during specific times of the year (like our checklist that covers end of year planning issues), the following are the top 10 most popular resources throughout the year.

- **Important Numbers:** Stay up-to-date on the numbers that affect your clients using this Quick Reference Guide.
- **Master List Of Goals:** Help your clients Identify and prioritize which goals are the most important to them.
- **Issues to Consider As A New Client:** First impressions matter. Enhance your client's initial experience and ask the right questions to identify planning opportunities.
- **Issues To Consider In A Client Annual Review Meeting:** Provide a framework to ensure that major planning opportunities are addressed during annual client review meetings.
- **Should I Consider Doing a Roth Conversion?** Roth Conversions are an important strategy to discuss with many clients. This resource can help guide the conversation and become an important strategy discussion.
- **What Issues Should I Consider When Reviewing My Investments?** Help guide your conversation when reviewing investment portfolios with your clients.
- **Should I Take My Pension As A Lump Sum?** Help clients decide if taking a lump sum distribution/buyout is right for them.
- **Should I Consider Refinancing My Mortgage?** Each client's situation is unique, and many factors must be considered before making the decision to refinance.
- **What Issues Should I Consider If I Experience A Sudden Wealth Event?** Unexpected wealth events, both large and small, can alter a client's financial plan.
- **What Accounts Should I Consider If I Want To Save More?** Help your clients identify which accounts are the most appropriate ones to save more.