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# Popular Checklists & Flowcharts

The most popular checklists and flowcharts may be useful when you least expect it. Keep this list handy so you can quickly navigate to the guides that can add depth to a conversation or help you respond to an unexpected inbound call.

- **What Issues Should I Consider When Reviewing My Estate Planning Documents?** Use this checklist to guide your review on common estate planning documents, including wills, living trusts, irrevocable trusts, powers of attorney, and living wills.
- **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 In A Client Annual Review Meeting:** Provide a framework to ensure that major planning opportunities are addressed during annual client review meetings.
- **What Issues Should I Consider When Establishing My Charitable Giving Strategy?** This checklist prompts your clients to consider philanthropic motivations and goals, cash flow, asset selection for funding gifts, and tax planning when they are implementing a charitable giving strategy.
- **What Issues Should I Consider When Reviewing My Health And Life Insurance Policies?** Leverage this checklist to review life and health insurance policies to ensure your clients have the courage they need.
- **Should I Use A Donor Advised Fund (DAF) When Giving To Public Charities?** Share this flowchart to guide your clients through conversations about strategic giving.
- **What Issues Should I Consider When Reviewing Cash Flow?** Cash flow can make or break a financial plan. Share this checklist to cover cash flow basics, including income sources, essential and discretionary spending, debt and taxes, goal funding, and monitoring strategies.
- **What Issues Should I Consider At The Start Of The Year?** Use this checklist to to help your clients review their circumstances and create an actionable plan for realizing their resolutions.
- **Should I Roll Over My Dormant Traditional 401(k)?** Employ this flowchart to help your clients consider common issues before rolling over their 401(k).