



STANISLAWSKI & COMPANY, INC.
A Certified Public Accounting and Business Consulting Firm

July ~ August 2011

RE: Lifetime To Do List & Planning

Dear Friends of Stanislawski & Company, Inc.:

A famous quote states “Businesses don’t plan to fail.... they just fail to PLAN.” Planning for success means planning for the future but many people spend more time planning their vacation than planning their future. As mentioned in our prior newsletter, summertime is a great time to catch-up on your To Do list. Things can get a little slower during the summer months giving you additional time to catch-up on those very important things that you just have not had a chance to finish yet.

On the reverse side of this letter you will find our Stanislawski & Company, Inc. “Lifetime To Do List.” This is a list we have developed over the last 50 years to assist our clients in being proactive, not reactive. We call it a Lifetime To Do List because not all things will apply to you at one time, but most of these things will apply to you or your relatives or colleagues during a lifetime.

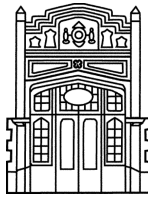
In addition, we want to remind you to be sure to check and update your will and trust, check the title of your various assets (to make sure they are in the name of your living trust, where applicable), and check your beneficiary forms for your bank and retirement accounts because beneficiary forms supersede your will and trust!

Do you need help with anything on the “Lifetime To Do List”? Call us because after 50 years we are the “go to” experts in consulting.

Sincerely,

Charles G. Stanislawski, M.B.T., C.P.A.

If your CPA is retiring please think of us.



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LIFETIME "TO DO" LIST

<i><u>Please Prioritize</u></i>	<u>ACTION PLAN</u>	<u>DATE DUE</u>	<u>DATE COMPLETED</u>
_____	<u>Business</u>		
_____	Strategic business plan	_____	_____
_____	Marketing plan	_____	_____
_____	Buy-sell agreement	_____	_____
_____	Disability insurance - monthly income	_____	_____
_____	Disability insurance - buyout	_____	_____
_____	Long-Term Care insurance	_____	_____
_____	401(k) deferred compensation plan	_____	_____
_____	Pension plan and investment policy	_____	_____
_____	Succession planning	_____	_____
_____	Retirement planning	_____	_____
	<u>Individual</u>		
_____	Will and family living trust	_____	_____
_____	Family living trust <u>completely</u> funded	_____	_____
_____	Durable Power of Attorney for health care	_____	_____
_____	Durable Power of Attorney for finances	_____	_____
_____	Life insurance trust	_____	_____
_____	Child medical release authorization	_____	_____
_____	Child custody authorization	_____	_____
_____	Worker's compensation insurance - for rental properties (to record handymen)	_____	_____
_____	1099 requirements for rental properties & companies	_____	_____
_____	Retirement planning including social security decisions, 401(k)'s, annuities, etc.	_____	_____
_____	Investment policy	_____	_____