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LIFETIME "TO DO" LIST

<i>Please Prioritize</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	_____	_____

The best ideas come from the best C.P.A.s - call Stanislawski & Company, Inc.