

Exercise 11.5
How Advisors Can Help

10 minutes

In the following to-do list, check which of the tasks your advisors have carried out, and make notes on any that are incomplete or for which you have questions.

Advisor Tasks	Notes
___ Review current legal documents and provide summary	
___ Assess gaps in current planning	
___ Assess the feasibility of a philanthropic project, now or later	
___ Help reduce estate and income taxes	
___ Help develop a program to transfer my business to heirs	
___ Help with an exit strategy for my business	
___ Review existing insurance for adequacy	
___ Coordinate my planning team to get the job done	
___ Suggest referrals to allied professionals	
___ Other:	