fpPATHFINDER

Most Popular Guides

The most popular guides 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.

- **Important Numbers:** Stay up-to-date on the numbers that affect your clients using this quick reference guide.
- **What Issues Should I Consider Before The End Of The Year?** Lead conversations that cover end-of-year topics, including tax planning, investment and retirement accounts, charitable giving, cash flow and savings, insurance, and estate planning.
- **What Issues Should I Consider Regarding Changes Made By The Secure Act 2.0?** Using this checklist, you will be able to effectively highlight the important changes that affect your client, identify some proactive planning points to consider, and be able to chronologically prioritize which next steps should be taken.
- **What Issues Should I Consider When Creating My Estate Plan?** With your guidance, clients will have a better idea of what questions to ask when creating their estate plan, as well as clarification on what will happen to their assets after they are gone.
- **Where Should My Next Dollar Go?** This flowchart will help facilitate a more meaningful conversation between you and your client about their unique goals and preferences.
- **Master List of Goals:** Help your clients identify and prioritize which goals are the most important to them.
- **Issues To Consider In Client Annual Review Meeting:** This checklist covers 40 of the most important planning issues to identify and consider during a client annual review meeting.
- **What Issues Should I Consider Before I Retire?** This checklist covers 32 of the most important planning issues to identify and consider for a client who is about to retire.
- **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.
- **Should I Consider Doing A Roth Conversion?** This flowchart helps you walk your clients through the important considerations to weigh before doing a Roth conversion.
- **What Issues Should I Consider When Reviewing My Beneficiaries?** With your help, clients will have a clearer picture of who their beneficiaries are, and whether their account beneficiary designations are in alignment with their overall estate planning goals.

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