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The 8 Wealth Management Issues Document

Client Name:

Date:

	Issue	Date (Discussed)	Action Plan	Date (Accomplished)
1	Investment Management Issues			
2	Cash Flow and Debt Management Issues			
3	Family Risk Management Issues			
4	Retirement Planning Issues			
5	Education Planning Issues			
6	Legacy Planning Issues			
7	Business Planning Issues			
8	Special Situations Planning Issues			