OREGON PACIFIC FINANCIAL ADVISORS, INC.

Life By Design ™
10 Point Annual Review Checklist

1.) Check in	Any lifestyle changes last year or projected in the next year? What could we change or do to make our relationship better?	❑
2.) Net Worth	Update this year and compare to past statements.	❑
3.) Income	Verify current and projected income sources.	❑
4.) Cost of Living	Verify your monthly income need.	❑
5.) Taxes	Review most recent tax return.	❑
6.) Measure Progress	Update your “Financial Independence” Chart to measure your progress.	❑
7.) Last Year’s Actions	Review last year’s “to do” list for both you and your advisor.	❑
8.) Legal	Review the date of your last will or trust and gather required information or changes regarding your beneficiaries.	❑
9.) Investments	Discuss minor investment changes if needed, or schedule a meeting to discuss in more detail.	❑
10.) Written Summary	A written summary of this Annual Review meeting will be mailed to you.	❑