



Oregon Pacific
Financial Advisors, Inc

Here is what we cover Annually with the **Life By Design™** **10 Point Annual Review Checklist**

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|--------------------------------|--|--------------------------|
| 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? | <input type="checkbox"/> |
| 2.) Net Worth | Update this year and compare to past statements. | <input type="checkbox"/> |
| 3.) Income | Verify current and projected income sources. | <input type="checkbox"/> |
| 4.) Cost of Living | Verify your monthly income need. | <input type="checkbox"/> |
| 5.) Taxes | Review most recent tax return. | <input type="checkbox"/> |
| 6.) Measure Progress | Update your “Financial Independence” Chart to measure your progress. | <input type="checkbox"/> |
| 7.) Last Year’s Actions | Review last year’s “to do” list for both you and your advisor. | <input type="checkbox"/> |
| 8.) Legal | Review the date of your last will or trust and gather required information or changes regarding your beneficiaries. | <input type="checkbox"/> |
| 9.) Investments | Discuss minor investment changes if needed, or schedule a meeting to discuss in more detail. | <input type="checkbox"/> |
| 10.) Written Summary | A written summary of this Annual Review meeting will be mailed to you. | <input type="checkbox"/> |