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Financial Wellness:
A Holistic View



Seeing the Bigger Picture

A thoughtfully constructed financial plan takes a holistic view of wealth management and understands how each 'puzzle piece' interacts with the others.



Assessing Your Financial Wellness

The new year provides a great opportunity to review your existing plans and evaluate where updates are needed. As you go through this guide, we encourage you to use the below scorecard to assess your 'financial wellness.'

	Up-to-Date <i>(No Action Needed)</i>	Review <i>(Action may Be Needed)</i>	Update <i>(Action Needed)</i>	Not Applicable
Tax Planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charitable Planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investment Planning / Allocation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirement Planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social Security & Medicare	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Estate Planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Beneficiary Designations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Insurance Planning <i>(Life, Property & Casualty)</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



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