



# **ChappelWood Financial Services 13 Point Wealth Management Inspection**

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ChappelWood Financial Services is an independent Registered Investment Adviser registered with the Oklahoma Securities Department and the Texas State Securities Board.

# 13 Point Wealth Management Inspection



Client Name: \_\_\_\_\_

Wealth Management Issue	Priority	Actions Planned/ Taken	Date Discussed/ Reviewed
Investment Planning			
Risk Management and Insurance Planning			
Banking and Credit Management			
Retirement Planning			
Executive Compensation			
Business Succession Planning			
Planning for Incapacity			
Education and Family Support			
Charitable Giving			
Titling and Beneficiary Designations			
Executor and Trustee Selection			
Distribution of Estate			
Tax Planning			

Next review date: \_\_\_\_\_