

YOUR WEALTH PLAN CHECKLIST

NAME: Date:

ACTIVITY	TARGETED COMPLETION DATE	ACTIONS					
FOUNDATION							
Baseline [P&L/Balance Sheet]							
Business Plan							
Entities							
Cash Machine							
Forecast [Spending Plan]							
Wealth Account							
Business Bank Account Wealth Account iFlip							
Credit Card [Per Company]							
Contracts/Operating Agreement [Updated]							
Debt Plan							

Current Investment		
Review/Plan		
Money Rules		
, i		
Trust (land/property)		
rrust (land/property)		
	A	CCELERATION
Investing Plan		
D M. I.I.		
Revenue Model		
Marketing Plan		
Sales Process		
Sales Process		
Revenue Producing Day		
Goals		
	l.	
NOTES:		
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