



**INTEGRATED WEALTH
SYSTEMS**

YOUR WEALTH PLAN CHECKLIST

NAME: _____ Date: _____

ACTIVITY	TARGETED COMPLETION DATE	ACTIONS
<i>FOUNDATION</i>		
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		

