Portfolio Review Checklist

Hi! We might have missed the chance to meet up and have an update on your current situation. However, I do have a checklist on the specific concerns some of my clients face. Appreciate that you take a few minutes to complete this form and WhatsApp/Email it back, for me to follow up with you. **Please tick the concerns you have now:**

Protection Planning:

☐ Family Income/Expenses Protection
☐ Critical Illness (Early/Intermediate/Advanced) Protection
☐ Severe Disability, ElderShield & CareShield Life
☐ Accident Protection
☐ Mortgage Loan Protection
☐ Hospitalization Cost Protection
☐ MediShield Life & Integrated Shield Plans

Wealth Accumulation:

☐ Emergency Fund Planning
☐ Singapore Savings Bond
☐ CPF Matters (Basic/Full/Enhanced Retirement Sum) & CPF LIFE
☐ Supplementary Retirement Scheme (SRS)
☐ Personal Income Tax Planning
☐ Education Funds Planning
☐ Retirement Planning

Legacy Planning:

☐ Wills & Trusts
☐ CPF Nominations
☐ Nomination of Beneficiaries (Insurance Policies)
☐ Lasting Power Of Attorney
☐ Advanced Medical Directive

With these being said, the above are specific concerns you may have right now. The key question is how all these pieces fit together - what does your bigger picture look like? The way I can add the most value is through an advice-driven approach, shaped by years of experience working with clients with diverse goals. My focus is on providing unbiased advice, based on your unique circumstances, to help you clarify that big picture. If you'd like to explore this further, feel free to reach out.

☐ **The Clarity Program – A Unique Process**
Big Picture Clarity, Portfolio Clarity, Safety Net Clarity, Lifestyle Clarity, Legacy Clarity & Clarity Review
Link -> theclarityprogram.com

Remarks: ____

Best Time to Follow Up With Me:
1-2 Weeks / 3-4 Weeks / 1-2 Months / 3 Months / 6 Months / 1 Year Later