

Life Events Checklist

Change is a constant part of life. In order to determine how we may best serve you, please complete the form below and return it to us at your earliest convenience.

Common Life Events

- New child or grandchild
- New job or promotion
- Receipt of an inheritance
- Major investment gain/loss
- Health concerns
- Change in marital status
- Change in estate plan
- Sale or purchase of home
- Start/purchase a business
- Sold or acquired assets
- Death of family member
- New investments or insurance
- Retirement
- Gain/loss of business partner
- Other: _____

Areas of Interest or Concern

- Retirement planning
- Estate planning
- Major asset purchase/lease
- Business/exec. benefits
- Personal property/liability ins.
- Education funding
- Income tax planning
- Planning for parents
- Business continuation
- Disability income
- Investment review
- Survivor benefit planning
- Health/LTC planning
- Charitable giving
- Other: _____

Additional Comments and Notes

Contacting You

Name: _____ Address: _____

Telephone: _____ Best time to call: _____

Please contact me as soon as possible Email: _____



Capital Wealth Investments
132 Adams Ave. Scranton, PA 18503
570-543-5255