



Completed On: _____

List of Qualified and Trusted Advisors

Review and update your list at least annually. If you are married, complete this list together. Make sure both spouses are comfortable working with the advisor in the event they find themselves in need to seek out the advisor on their own (e.g. after first death).

| | |
|--------------------------------------|--|
| Spiritual Advisor | |
| Mentor | |
| Accountability Partner | |
| | |
| Accountant | |
| Financial Planner | |
| Financial Advisor/Investment Manager | |
| Estate Attorney | |
| Personal Banker | |
| Mortgage Broker | |
| Insurance: Property & Liability | |
| Insurance: Medical, Dental, Vision | |
| Insurance: Life, LTC, Disability | |
| | |
| Auto Sales | |
| Realtor | |
| | |
| Auto Mechanic | |
| Electrician | |
| HVAC Repair | |



Completed On: _____

| | |
|-----------------------|--|
| Plumber | |
| Home Repair | |
| Home Remodeling | |
| Roof Repair | |
| | |
| Primary Physician | |
| Hospital | |
| Dentist | |
| Optometrist | |
| Pharmacist | |
| Chiropractor | |
| Specialist Physician: | |
| Specialist Physician: | |
| Specialist Physician: | |
| Veterinarian | |
| | |
| Barber | |
| Hair Dresser | |
| | |
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| | |

God loves you. God loves you. God loves you. God loves you.

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