LITTLE & ASSOCIATES
WEALTH MANAGEMENT
Home of the SWAN FORMula™

Management Issue		Discussed / Completed		Action Plan
1	Investment Issues			
2	Insurance Issues			
3	Liabilities Issues			
4	Qualified Retirement Plan / IRA Issues			
5	Stock Option Issues			
6	Business Succession Plan Issues			
7	Durable P.O.A. Issues			
8	Gifiting to Children/ Descendent Issues			
9	Charitable Gifting During Life Issues			
10	Titling of Assets Issues			
11	Executor/Trustee Issues			
12	Distribution of Wealth at Death Issues			
13	Charitable Inclinations at Death Issues			

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