Covenant
Wealth Management

13 Wealth Management Issues

In working with clients over the years, we have found that many of the issues that face clients today can be addressed in 13 different but interrelated areas of wealth management. Some may be very pertinent to you; some may not apply at all. Examining your wealth in light of these areas can often provide a framework for discussion, illuminating areas of opportunity or concern in your own financial situation. As you prepare for our next discussion, please take some time to think about your current situation as it may relate to these areas.

1. Investment Planning
2. Risk Management & Insurance Planning
3. Banking & Credit Management
4. Retirement Planning
5. Executive Compensation
6. Business Succession Planning
7. Planning for Incapacity
8. Education & Family Support
9. Charitable / Ministry Giving
10. Titling & Beneficiary Designations
11. Executor & Trustee Selection
12. Distribution of Estate
13. Tax Planning