SHERRILL WEALTH MANAGEMENT

STANDARD OF CARE

CHECKED & IN ORDER	ATTENTION REQUESTED	ACTION REQUIRED	NOT APPLICABLE	
				RISK (Asset Protection)
				Estate Documents
				Titling & Beneficiary
				Longevity & Incapacity
				Roles & Responsibilities
				Domicile & Housing
				Insurance - Life, LTC, Liability
				Credit & Liabilities
				Advanced Strategies
				INCOME (Tax Efficiency)
				Pension / Social Security
				Dynamic Distribution Strategy
				Total Return vs Income
				Asset Location
				Tax Projection
				Required Minimum Distributions
				Year end Harvesting
				Roth Conversions
				ASSETS (Investment Management)
				Risk Scoring
				Sequencing / Guardrails
				Allocation / Investment Objective
				Selection Bias
				Factor Exposure
				Fiduciary Scoring
				Rebalancing / Reallocating
				Vitamin C

CLIENT 1: D.O.B: Age:

CLIENT 2: D.O.B: Age:

Phone: Email: Date:

NOTES: