

January 1, 2020
Chip & Joanna Gaines

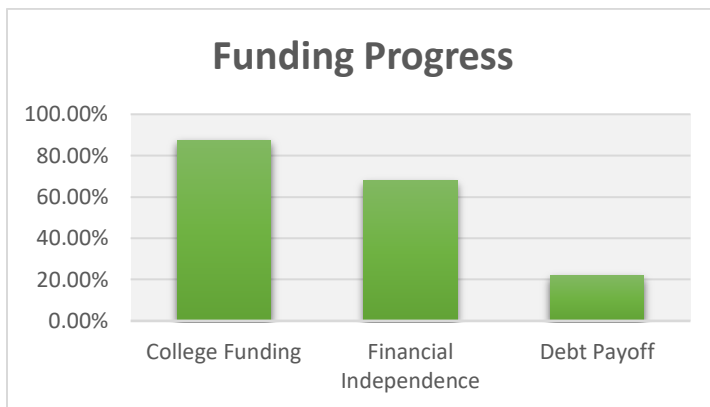


Mountain Wealth Planning

UPDATES

- ❖ Outcome of Meeting with the Estate Planner?
- ❖ Close on new Home-Buy?
- ❖ Where is Duke looking to go to college?

Goal	Status
Fully Fund kids' 529s	On-Track
Financial Independence	Monitoring
Increase Profit Margins	Monitoring
Debt Free	Initiating

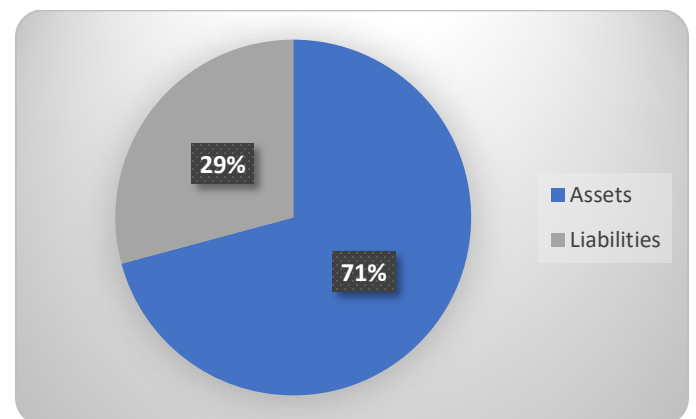
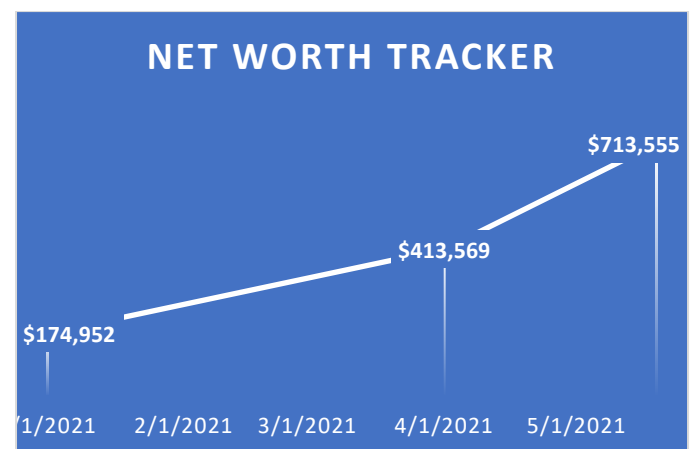


NOTES

- ❖ Cash Flow / Net Worth Spreadsheets
- ❖ Insurance Analysis
- ❖ Beneficiary Checklist

ACTION ITEMS

- ❖ Gaines
 - Decide Upon Financial Advisor
 - Register for your Financial Planning Portal
 - Upload Financial Documents into Vault
 - Review & Sign Agreements
- ❖ MWP
 - Guide Clients through On-Boarding Process
 - Provide List of Documents Requested



COMPLETED ACTION ITEMS:

- ❖ Bought new home
- ❖ Have two lovely children
- ❖ Leading meaningful & prosperous lives