KELLY
FINANCIAL PLANNING, LLC

Financial Team of Advisors Worksheet

Role / Professional	I Have Engaged a Professional (Y/N)	Name & Contact Information	Do I Need This Role Now or Later	Notes / Action Steps
Certified Financial Planner (CFP®)	☐ Y ☐ N		☐ Now ☐ Later	
Accountant / CPA	☐ Y ☐ N		☐ Now ☐ Later	
Estate Planning Attorney	☐ Y ☐ N		☐ Now ☐ Later	
Insurance Advisor	☐ Y ☐ N		☐ Now ☐ Later	
Banker / Lending Officer	☐ Y ☐ N		☐ Now ☐ Later	
Real Estate Agent	☐ Y ☐ N		☐ Now ☐ Later	
Coach / Mentor	☐ Y ☐ N		☐ Now ☐ Later	
Other:	☐ Y ☐ N		☐ Now ☐ Later	