Continuity Profile

Quick Reference Guide

Moors & Cabot Investments
Est. 1890

M&C Continuity Profile

The M&C Continuity Profile is a quick reference guide designed to provide a summary of your assets, liabilities, incomes and expenses to your loved ones, executors, or trusted contacts in the event of your incapacity or death.

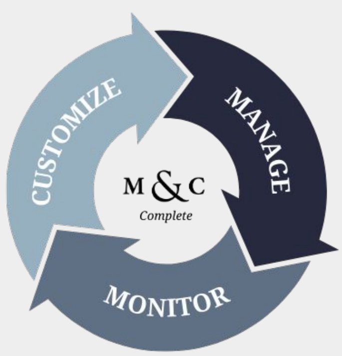
Completing this inventory is a first step in developing your continuity plan. It will increase the likelihood your assets are accounted for and considered and your beneficiaries are taken care of. An up-to- date inventory will prove invaluable to your surviving heirs, executors, trustees and advisors as your estate is settled.

This inventory is also a useful reference when creating or updating your wealth management plan. It will help you step back and look at your overall financial situation and ensure you have considered all aspects of your financial affairs. You should update this document whenever significant changes in your family's financial status occur.

M&C Complete

M&C Complete is our comprehensive personalized client service model. It is designed to incorporate financial planning, investment management, communication, and holistic advice into each client relationship.

You are an individual, and your wealth management strategy should reflect that. If you are interested, we have a more comprehensive *"family inventory"* document that goes into extensive detail as a complete reference guide in the event of your incapacity or death. Contact your financial professional to learn more.



Personal Information:

Name:	Name:

DOB:	Retirement Year:	DOB:	Retirement Year:
Address:			
Dependents:			
DOB(s): :			

Assets: ***TAXABLE***

Institution	Owner	Account Number	Apx. Balance

TAX DEFERRED

Institution	Owner	Account Number	Apx. Balance

HARD ASSETS

Description	Owner	Apx. Balance	Location

Liabilities:

Mortgage (P&I):	Rate:	Balance:	Payoff Year:
Auto:	(PoY):	Credit Card Debt:	Other:
Additional:			

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Recurring Income:

Description	Owner	Amount	Frequency

Recurring Expenses:

Description	Owner	Amount	Frequency

Estate Planning:

Will:	Year::	Trust:	Year:
POA:		HCP:	
LTC:		Provider	
Life Insurance:	Provider:	Amount:	
Other:			

Professional Contacts:

	Name	Phone Number	Email
Attorney			
CPA			
Financial Professional			
Other			

Additional Information:
