



## Executive Financial Dashboard

Annual Financial Checkup Summary

Client Name	
Review Date	
Advisor	

Financial Health Metric	Score / Status	Notes
Retirement Readiness Score	___ / 100	Income readiness, retirement timeline
Pension Readiness (CALSTRS Gauge)	___ %	Pension estimate, retirement age
Financial Protection Score	___ / 100	Life insurance, LTC planning
Estate Planning Completion	___ %	Will, trust, POA, beneficiary review
Savings Progress Tracker	___ % of target	Retirement contributions, savings rate

Top Strategic Priorities for the Next 12 Months	

This executive dashboard summarizes the key areas of your financial life and highlights opportunities to strengthen your financial strategy moving forward.