

Wealth Management, RIA & Family Office Binder Tabs

Client Review Binder Tabs — 10-Tab Set

Specification

Letter size, ten tabs in two banks of five (1/5 cut), white 90# index with clear Mylar on every tab, collated in binder order, 3-hole punched.

The 10 tabs

- | | |
|---------------------------|------------------------|
| 1. Client Profile | 6. Estate Planning |
| 2. Account Summary | 7. Insurance Review |
| 3. Investment Performance | 8. Retirement Analysis |
| 4. Asset Allocation | 9. Goals & Objectives |
| 5. Tax Planning | 10. Action Items |

Every section name is yours to change at the same price.

Prices

Sets	Per set	Order total
25	\$9.92	\$247.88
50	\$6.02	\$300.75
100	\$4.62	\$461.50
250	\$3.24	\$808.75

Prices as of October 10, 2026, from tabzoola.com. Setup included. Free UPS Ground on orders over \$75.

Ordering

- Free PDF proof before anything prints
- About 5 business days from proof approval
- 25-set minimum; no account needed
- Made at the Anselmo Die & Index plant, Schaumburg, Illinois

Order this set



Scan or click: the designer opens with these tabs filled in.

More about this set: tabzoola.com/tabs/wealth-management-binder-tabs