



What Keeps You Up at Night



There are many things in our lives that make it difficult for us to sleep, but concerns about our financial future can keep us up long into the night. The good news is we have information and tools to address many of life’s challenges. Please take a minute to review the topics and related questions. Check off the items that you have concerns or questions about right now.

Financial Basics

- How do I keep my records safe and organized?
- Are there strategies to improve my budgeting and reduce debt?
- How do I balance investing interests with my savings needs?
- How much should I have in emergency savings?
- How do I teach young children about money?
- When is the right time to help young adults establish a financial strategy?
- How do I start financial discussions with family and what should I include?

Retirement

- Will my money last through retirement?
- Do I need long-term care insurance?
- What are my retirement investment options?
- How do I manage all my retirement plans?
- What should I consider before claiming Social Security?
- Will I be covered by Medicare or need a certain amount to pay for healthcare?
- Since I am retiring soon, what do I need to do now?

Life Events

- How do we manage our finances after getting married?
- What happens to my 401(k) when I change jobs?
- What are my options if I lose my job?
- How do I help my recent college grad transition into the workforce?
- How should I plan for my child with special needs?
- What are the financial implications if I get divorced?
- What do I do when a loved one dies?
- How will a new baby change our finances and financial planning?



Education Planning



- How much should I save for college? When should I start planning?
- What types of financial aid options are available?
- How does financial aid work when you are divorced?
- What are my college savings options?
- How will taking out college loans impact my children and myself?
- How do I balance saving for my retirement vs. saving for my kids' future college costs?
- How should my children manage their student debt?

Elder Care Planning



- What happens if I have to care for my parents?
- What should I consider when evaluating care facilities?
- How do I cope with a diagnosis of Alzheimer's disease or dementia?
- How does Medicare work?
- How can I keep track of my parents' medicines, health appointments and finances?

Estate Planning



- What is estate planning and how do I protect my estate?
- Will my family be secure if something happens to me?
- How do I create a legacy for my children and grandchildren?
- Can I provide for my favorite charity when I am gone?
- What will my survivors need to know?
- Do I have the correct estate documents?
- What is a trust and do I need one?
- How do I protect my estate from taxes and my heirs from owing estate taxes?
- What is a power of attorney? What is a healthcare power of attorney?

PLEASE COMPLETE IF I MAY REACH OUT TO YOU.

Name:

Phone number:

Email:

Best time to call:

Contact us today so we can discuss your concerns and any questions you may have.

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