

What keeps you up at night?

RETIREMENT

- Will my money last through retirement?
- What are my retirement options?
- How do I manage all my retirement plans?
- I am retiring soon, what do I need to do now?
- Do I need long-term care insurance?

EDUCATION PLANNING

- How much money should I save?
- Will I qualify for financial aid?
- What are my college savings options?
- How do I teach my children about money?

LIFE EVENTS

- What happens to my 401(k) when I change jobs?
- What are my options if I am laid off?
- I'm getting divorced, what happens to my assets?
- What do I do when a loved one dies?

ESTATE PLANNING

- How do I protect my estate from taxes?
- Will my family be secure if something happens to me?
- How do I create a legacy for my children?
- Can I provide for my favorite charity when I am gone?
- What will my survivors need to know?

FINANCIAL BASICS

- How should I keep my records safe and organized?
- How long should I retain financial documents?
- How do I reduce my debt?
- How much money should be in my rainy day fund?

ADDITIONAL CONCERNS



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