

What is Keeping You Awake at Night?

Please take a minute to review the topics and related questions below. Check any concerns you have right now and we can address any issues that worry you.

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 do with my employer retirement plan?
- Since I'm retiring soon, what do I need to know?
- Should I retire to a different state?

Education Planning

- How much should I save for college?
- When should I start saving?
- Will I qualify for financial aid? How do I find out?
- What are my college saving options?

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'm laid off?
- What happens to my assets after my divorce?
- What do I do if a loved one dies?

Elder Care

- How does Medicare work?
- What should I look for in a nursing home?
- How do I cope with Alzheimer's Disease?
- What happens if I have to care for my parents?

Estate Planning

- What should I know about 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'm gone?
- What will my survivors need to know?

Financial Basics

- How do I keep my records safe and organized?
- How do I do a better job of budgeting?
- How do I reduce my debt?
- How do I teach kids about money?
- How do I help a young adult establish a financial strategy?

This material should be used as helpful hints only. Each person's situation is different. You should consult your investment professional or other relevant professional before making any decisions.

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