

WHAT KEEPS YOU UP AT NIGHT?

Please take a minute to review the topics and related questions below. Check off any concerns you have right now. Chances are I have information that will help us address many of the issues that may 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 consider before claiming Social Security?
- What should I do with my employer retirement plan?
- Since I am retiring soon, what do I need to do now?

EDUCATION PLANNING

- How much should I save for college? When should I start planning?
- Will I qualify for financial aid? Where do I start?
- What are my college savings 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 am laid off?
- I am getting divorced. What happens to my assets?
- How do I help my recent college grad transition into the workforce?
- What do I do when a loved one dies?

ELDERCARE

- 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 am 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 budgeting? How do I reduce my debt?
- How do I teach little kids about money?
- How do I help a young adult establish a financial strategy?
- How do I have financial discussions with family?

REQUEST INFORMATION



NAME _____

ADDRESS _____

CITY _____

STATE _____

ZIP CODE _____

BUSINESS PHONE _____

HOME PHONE _____

EMAIL _____

BEST TIME TO CALL _____

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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