WHAT KEEPS YOU UP AT NIGHT?

PARADIGM
WEALTH PARTNERS

You have a lot to think about financially. In the list below, check off any concerns you have right now. A financial advisor can help address the unique financial challenges that you face, and that may be worrying you most. Knowing the right questions to ask is the first step toward finding solutions.

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?
- [ ] How could leaving the workforce to start a family impact my retirement savings?
- [ ] 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 my child's education or if I decide to go back to school?
- [ ] Will my child or I qualify for financial aid? Where do I start?
- [ ] What are my college savings options?

LIFE EVENTS

- [ ] How do we manage our finances together after getting married?
- [ ] What happens to my 401(k) when I change jobs?
- [ ] How do I plan for possible fertility treatment or adoption costs?
- [ ] 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?

Create the Life You Love.®

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