



CONROY
WEALTH MANAGEMENT

Life events – when to contact us

Below are examples of life events that our clients have experienced. We have been able to successfully help them navigate their finances through these changes in their lives.

- Υ Starting a new job
 - Review of benefits & discussion around plans for retirement accounts
- Υ Birth of a child
- Υ Planning for retirement
 - Healthcare / Medicare coverage and costs
 - Income planning & liquidity if retiring before 59 ½
- Υ Loss of a parent or loved one
 - Are you the executor or trustee? Are you expecting to receive an inheritance?
- Υ Looking to buy or thinking about selling a business
- Υ Divorce
- Υ Buying or selling a home or piece of property
- Υ Tax implications & strategies
 - Related to life events above

ACCEPTING
NEW CLIENTS BY
REFERRAL

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