EVOLVE

Women: Wired to Invest

Russell Investments

Get Organized!

Accessible (but not too accessible) important information.

Checklist

- ❑ Tax returns – 7 years
- ❑ Checking and savings
- ❑ Retirement accounts
- ❑ Investment accounts
- ❑ Home documents (titles, mortgage, rental agreements)
- ❑ Wills and trust
- ❑ Insurance
- ❑ Benefits
- ❑ Social Security
- ❑ Children's accounts
- ❑ Liabilities (Credit cards, car loans, student debt)
- ❑ Passwords

Update beneficiary forms!

Topics to explore with a financial advisor

Questions for women in their 20s & 30s: savings, debt management & family planning

- ❑ How can I maximize savings opportunities?
- ❑ How much should I save in 401k? IRA?
- ❑ How much should my emergency fund be?
- ❑ Types of investments I should consider?
- ❑ What is the impact of taxes on my savings?
- ❑ How can I best manage student loan debt?
- ❑ Do I need life insurance?
- ❑ Do I need a will?

Questions for women in their 40s & 50s: retirement, kids college & estate planning

- ❑ How do I plan further for my retirement?
- ❑ Should I be making IRA catch-up contributions?
- ❑ How much income will I receive from Social Security?
- ❑ What estate planning considerations do I have?
- ❑ Should I make asset allocation changes?
- ❑ Should I consider long-term care insurance?
- ❑ How much should I plan to contribute to my children's college education?
- ❑ What should I be thinking about for my aging parents and family members?

Questions for women in their 60s & 70s: retirement, estate & legacy planning

- ❑ How much can I spend monthly during retirement?
- ❑ Are my POAs and advanced directives current?
- ❑ When should I begin taking Social Security?
- ❑ Do I have enough long-term care insurance?
- ❑ What type of estate planning should I consider?
- ❑ Can I contribute to charitable organizations & how much per year?
- ❑ How much travel can I afford per year?
- ❑ Can I support my grandchildren's education?

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