

Get Organized!

Accessible (but not too accessible) important information.

Checklist

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|---|--|
| <input type="checkbox"/> Tax returns – 7 years | <input type="checkbox"/> Insurance |
| <input type="checkbox"/> Checking and savings | <input type="checkbox"/> Benefits |
| <input type="checkbox"/> Retirement accounts | <input type="checkbox"/> Social Security |
| <input type="checkbox"/> Investment accounts | <input type="checkbox"/> Children's accounts |
| <input type="checkbox"/> Home documents (titles, mortgage, rental agreements) | <input type="checkbox"/> Liabilities (Credit cards, car loans, student debt) |
| <input type="checkbox"/> Wills and trust | <input type="checkbox"/> Passwords |
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Update beneficiary forms!

Topics to explore with a financial advisor

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

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|--|---|
| <input type="checkbox"/> How can I maximize savings opportunities? | <input type="checkbox"/> What is the impact of taxes on my savings? |
| <input type="checkbox"/> How much should I save in 401k? IRA? | <input type="checkbox"/> How can I best manage student loan debt? |
| <input type="checkbox"/> How much should my emergency fund be? | <input type="checkbox"/> Do I need life insurance? |
| <input type="checkbox"/> Types of investments I should consider? | <input type="checkbox"/> Do I need a will? |
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Questions for women in their 40s & 50s: retirement, kids college & estate planning

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|---|---|
| <input type="checkbox"/> How do I plan further for my retirement? | <input type="checkbox"/> Should I consider long-term care insurance? |
| <input type="checkbox"/> Should I be making IRA catch-up contributions? | <input type="checkbox"/> How much should I plan to contribute to my children's college education? |
| <input type="checkbox"/> How much income will I receive from Social Security? | <input type="checkbox"/> What should I be thinking about for my aging parents and family members? |
| <input type="checkbox"/> What estate planning considerations do I have? | |
| <input type="checkbox"/> Should I make asset allocation changes? | |
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Questions for women in their 60s & 70s: retirement, estate & legacy planning

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