

Get Organized!

Accessible (but not too accessible) important information.

Checklist

<input type="checkbox"/> Tax returns - 7 years (Individual, joint and business)	<input type="checkbox"/> Insurance (Car, home, life, disability)
<input type="checkbox"/> Checking and savings accounts	<input type="checkbox"/> Benefits (Retirement, Beneficiary Designation Forms, Disability, Medical)
<input type="checkbox"/> Accounts (Checking, savings, investment, children's, retirement)	<input type="checkbox"/> Social Security
<input type="checkbox"/> Home documents (titles, mortgage, personal property titles, rental agreements, birth and marriage certificates, divorce decree, military discharge certificate)	<input type="checkbox"/> Liabilities (Credit cards, car loans, student debt)
<input type="checkbox"/> Wills and trust, durable health care Power of Attorney	<input type="checkbox"/> Passwords (Phone, computer, social media etc)
<input type="checkbox"/> Health Care Proxy / Advanced Medical directives	<input type="checkbox"/> Important people (Trusted Advisor information, emergency contacts, friend and family contact lists)

* For more comprehensive planning work with your advisor to complete the Family Wealth Planner

Update beneficiary forms!

Topics to explore with a financial advisor

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

- | | |
|--|---|
| <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 a 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? |

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"/> What else can I do to plan for my financial freedom later in life? |
| <input type="checkbox"/> Should I make asset allocation changes? | |
| <input type="checkbox"/> Am I taking advantage of tax managed and tax efficient vehicles? | |

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

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

Questions for women in their 80s and beyond: living with dignity and legacy

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|--|--|
| <input type="checkbox"/> Am I receiving all the benefits I am entitled to (Social Security, Pension, Veterans Benefits)? | <input type="checkbox"/> How do I make an informed choice about my care (assisted living or in-home care)? |
| <input type="checkbox"/> Do I have enough income and assets, and am I taking the right level of risk? | <input type="checkbox"/> Will I outlive my savings? |

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